eGulf

State of Missouri

Department of Economic Development
Public Service Commission

User Manual

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Document Change History

#	Date	Version	Description	By
1	04/08/2002	1.0	1st Version of the Document	Elizabeth Brookshire / Kim Caples

Table of Contents

1   Introduction

The Case Management System (CMS) has been developed for the State of Missouri Department of Economic Development, Public Service Commission (PSC). The Public Service Commission Automated System is for the complete automation of the document workflow using imaging software for the Department of Economic Development and is part of the Electronic Filing & Information System (EFIS). Case Management System (CMS) is for the PSCS solution and involves the processing of electronic documents through the web, email, fax and mail. Documents are submitted / filed by external users into the system. Consumers can file their documents electronically into the system, which are in turn launched into the internal workflow application through e-process workflow services, which are integrated with the automated solution.

This document explains the various processes involved in the Case Management System. The options across the top of the Home page are:

- ❖   Registration
- ❖   Forms / Instructions
- ❖   Inquiry / Complaints
- ❖   Filing / Submission
- ❖   Agenda
- ❖   Outage / Incident
- ❖   View Tariff
- ❖   Public Comments
- ❖   Resources

There are also various oval buttons on the left of the screen, based on the user's security. They may include: Home, Logon/Logout, Help, PSC Internet, Contact Us, Task List, Recall Tasks and Admin.

1.1 Objective
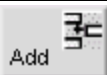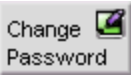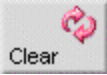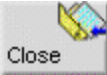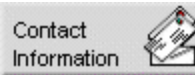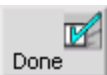
The objective of this manual is to introduce the Case Management System, explain its various functions and how it works.
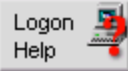
Definitions & Abbreviations	
CMS	Case Management System
EFIS	Electronic Filing & Information System
GCPL	Gulf Computers Private Limited
MPSC	Missouri Public Service Commission
PSC	Public Service Commission

There are many different buttons on the various screens. The following table is provided to help the user know their functions.

Button Definitions

Buttons	Definitions
ADMIN	This button will take the System Administrator to the Administration screens where they can make changes to the CMS.
CONTACT US	This button will take the user to a page that shows address of the PSC as well as an electronic contact link.
HELP	This button will take the user to a master Help screen.
HOME	This button will take the user to the CMS Home page.
LOGON	This button will take the user to the Logon page when they first open CMS. If they are already logged in, this button will allow them to log out or exit the system.
PSC INTERNET	This button will take the user to the PSC website.

Buttons	Definitions
RECALL TASKS	If a task has been deleted for any reason, it can be retrieved by the System Administrator at the request of the Divisional Director.
TASK LIST	This button will take a PSC employee to the Task List Process Screen (workflow area of the CMS) where they can begin processing documents.
Add	This is used by authorized representatives of a utility company to add another contact for that company.
Attach	This button allows the user to attach a file or document to the form being completed.
Broadcast	This button allows authorized users to broadcast a message to both internal and external users of the CMS.
Change Password	This button allows the user the change their password.
Clear	This button clears the screen and allows the user to reenter information.
Close	This button is similar to the Resolve button and is used to close outage reports.
Contact Information	Takes the user to section where they can enter contact information.
Done	When searching for a complaint / inquiry number, after the number has been found and the radio button selected, this button should be pressed. The user will be taken to their original form and the complaint / inquiry will be filled in. This button is also used when attachments have been added to a document.
Edit	This button allows authorized users to edit a broadcast message.
Exit	This button allows the user to exit the section or the application.
Logon	This button allows the user to log into the CMS.

Buttons	Definitions
Logon Help	This button takes the user to the Logon Help screen where their password will be sent to them via email after they answer a few questions.
Not Resolve	If the complaint / inquiry is not solved in the Quick Hit section, this button should be selected and the user will be taken to the detailed Complaint / Inquiry form. After completing this form, the user can press the Submit button and the form will be routed to the Consumer Services Department.
Print	This button allows the user to print the document.
Recall	After information has been deleted, this button can retrieve it.
Request	This button allows the employees to send an email requesting information to the utility companies or consumers.
Resolve	If the complaint / inquiry is solved, this button allows it to be saved to the database. No changes can be made after this button has been selected.
Route	This button allows the user to send the complaint / inquiry to another user.
Save	This button allows the user to save notes in the comment box of a document. To review the comments, the user should select the document and then select the History link.
Split	This button allows the user to divide a single complaint / inquiry into two separate complaints / inquiries.
Submit	The button allows the user to save entered information into the system.

1.2   Logon

The Logon screen will allow the user to sign into the Consumer Quality System.   External representatives should type in their Company/Firm ID (if applicable), User ID and Password, then press the Logon button.

Logon Screen

The user also has the option of changing their password. To change a password, type in the User ID and password, then select the Change Password button. The user will be taken to the Change Password screen on the next page.

The user should type in their old password, then a new password and then retype the new password. The maximum length for the password is eight characters. After pressing the Submit button, the user is sent to the PSC Home page. If the user enters the wrong User ID or Old password, if the old password entered does not match the current password in the system, or if the confirm new password does not match with the newly entered password, a message will appear asking user to correct the information. The Exit button will take the user back to the main Logon screen.

Password Screen

If the user has forgotten their password, they can select the Password Help button. After filling out each field, press the Submit button. The password will be emailed to the user.

Password Help Screen

1.3   Attachment Process

This process will be common to many modules. The user can attach either scanned documents or previously saved documents to the current submission by using the Attach button and subsequent options. When all appropriate documents have been attached, the user will select the Done with Attach button. This will return the user to the previous Filing screen. If the user wants to delete an attached document, they can check the box next to the unwanted attachment and then press the Delete button.

<u>Attachment Screens 1 & 2</u>

The user will:
1) Select the Attach button to open the Attachment screen.
2) Click the Browse button and navigate to the desired file's location.
3) Either double-click the file, or click the file once and then click the Open button.
4) Click the Attach button. Repeat steps 2) – 4) until the appropriate or necessary files are attached.
5) Click the Done with Attach button to leave the Attachment screen and return to the previous screen.

2   Registration

The first time a consumer or utility company uses the Case Management, they need to go to the Registration section. There are four choices for registering into the CMS system:

> ❖   Company / Firm
> ❖   Individual
> ❖   Attorney
> ❖   Contact Information

Registration Screen
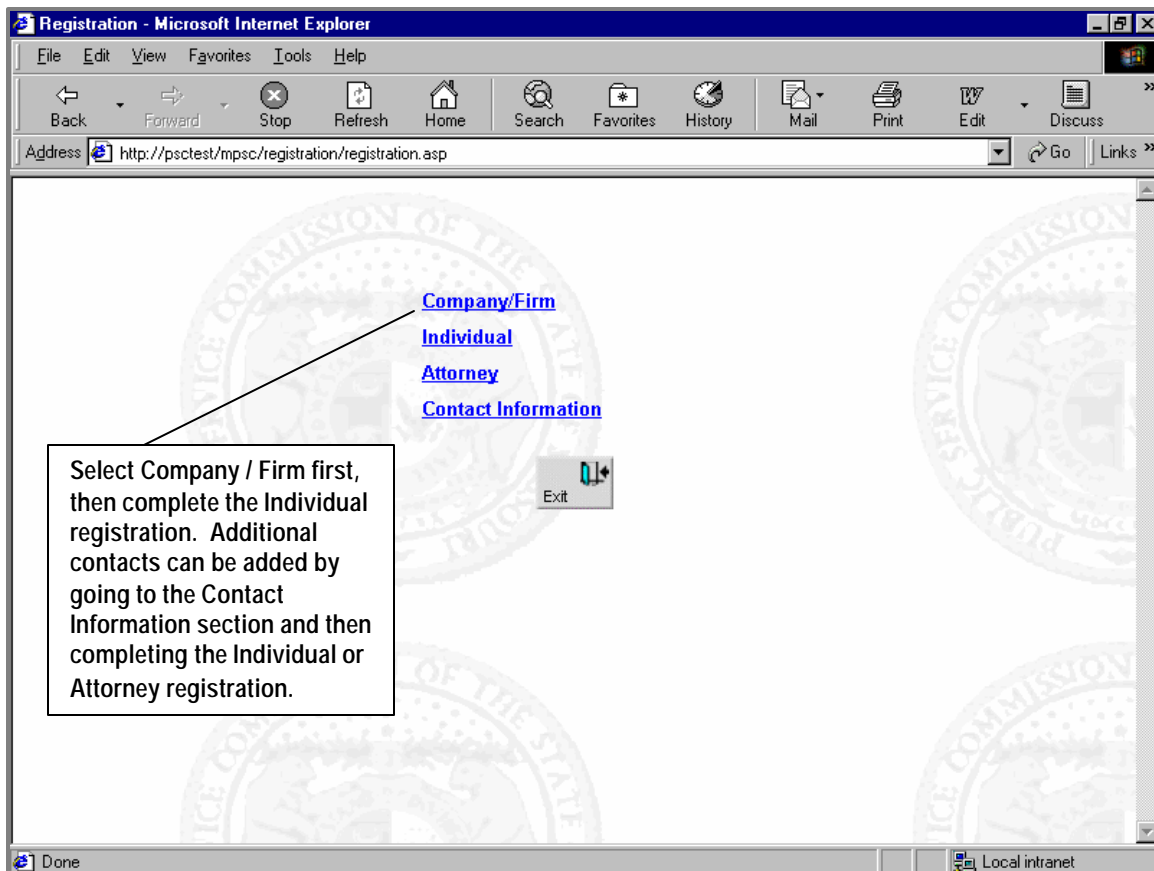
An individual consumer will need to register to make an inquiry or complaint and go to the Public Comments section.

2.1   Company / Firm

This form needs to be completed to register a new company / firm into CMS and to get a "Company ID". All mandatory fields (marked with a red asterisk) must be completed. If a company has already registered, the Existing radio button will be enabled and their information can be modified. To register a new Firm, the Law Firm checkbox should be checked. Information must be completed for Person 1 who will be the official company contact. A second contact can be added, but this is not mandatory. After all of the fields have been completed, the Submit button should be pressed. A "Company ID" will be generated for the user and the user will then be taken to the Registration Menu Screen.

Registration Screens

❖ Only the representative of a company can edit the information regarding the company and representative.
❖ At least one representative should be entered.
❖ Only the representative will be able to access the contact information button.

After the Submit button is pressed, the Result page will show the Company / Firm ID number and the names of the contacts. The first four characters of the company ID is the first four letters of the company name, then either I or A (for individual or attorney), then the initials of the contact and then three randomly generated numbers. Pressing the Exit button will take the user back to the Registration Menu screen.

<u>Company / Firm Registration Result Screen</u>
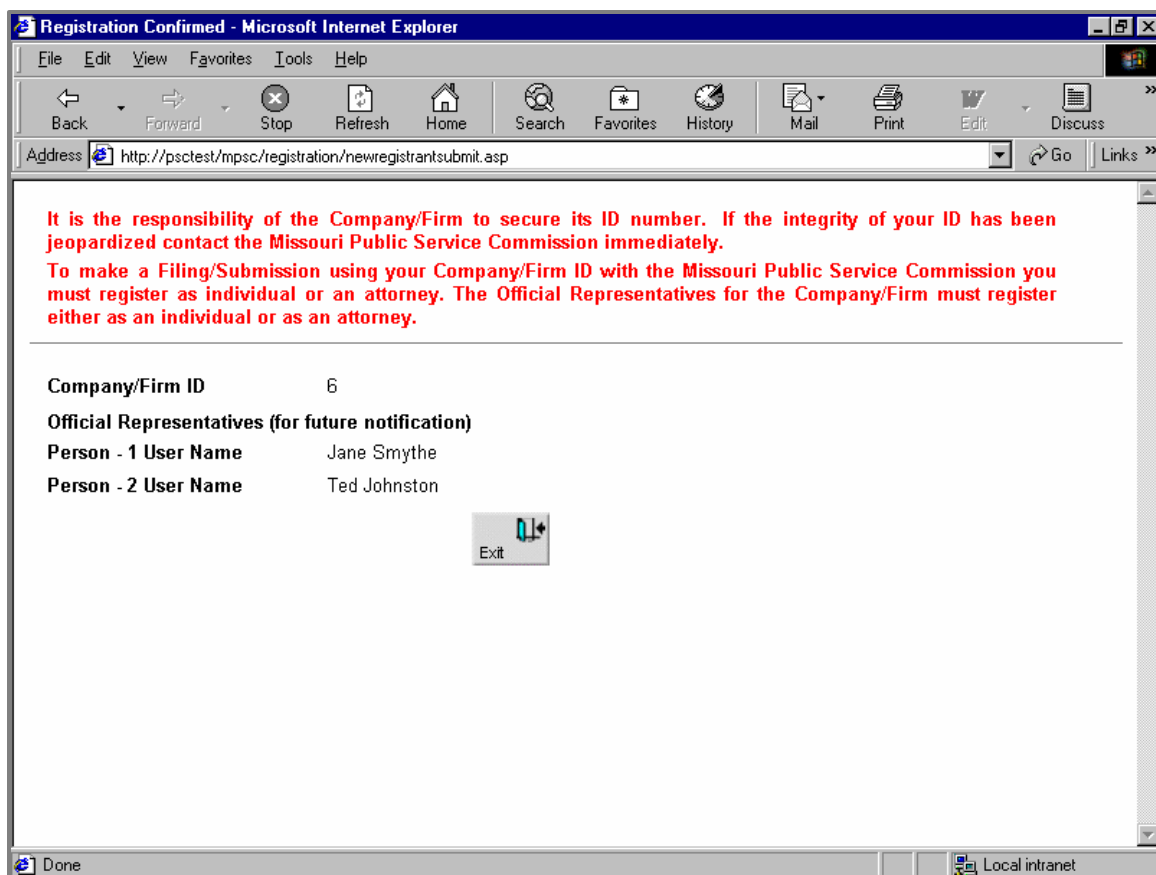
2.2   Individual Registration

After the company registration screen has been comple ted, then the emplyees who can file on behalf of the company need to register themselves as an individual. This individual registration is one kind of security provided to the company, so that only selected employees can file on behalf of the company. The Individual Registration screen is to register a new individual into the system and to get a "Individual ID". If the User ID already exists, then after that field is completed, the values in the other fields will autopopulate.
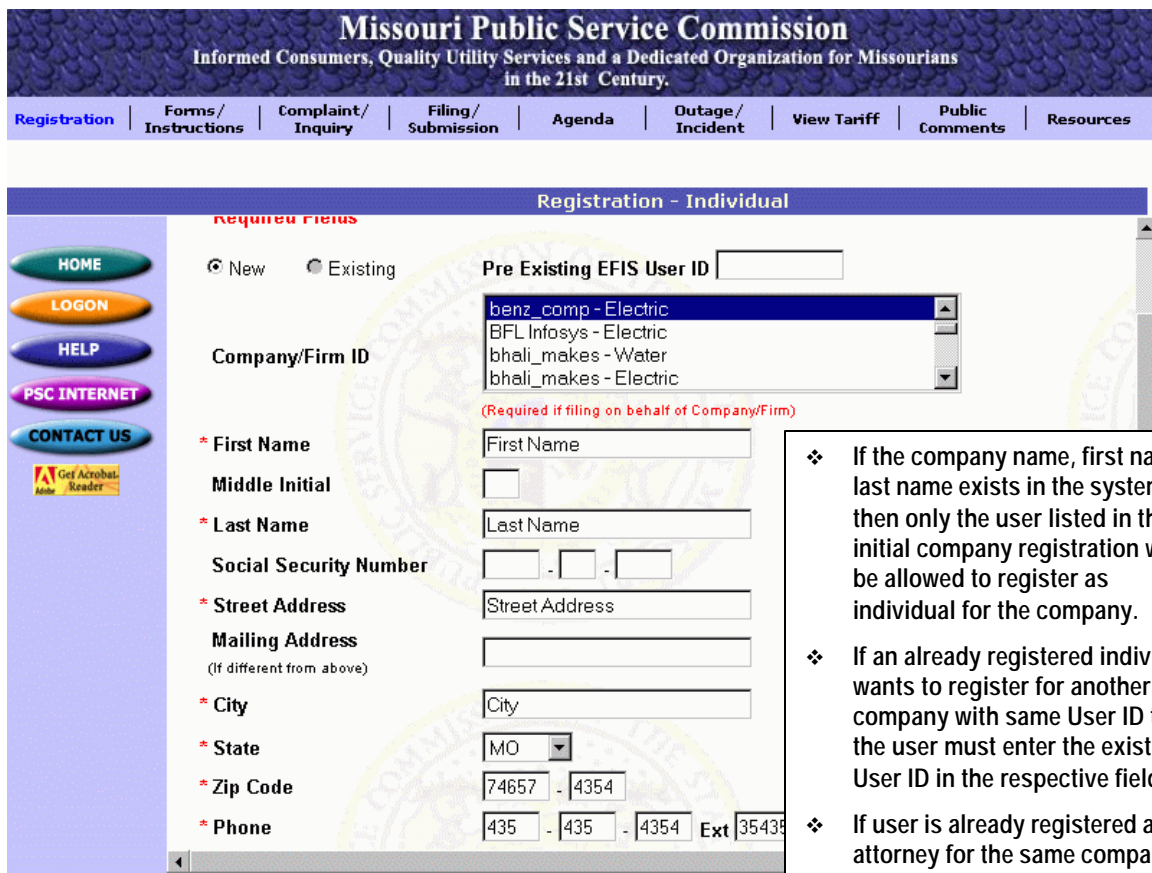
Individual Registration Screen
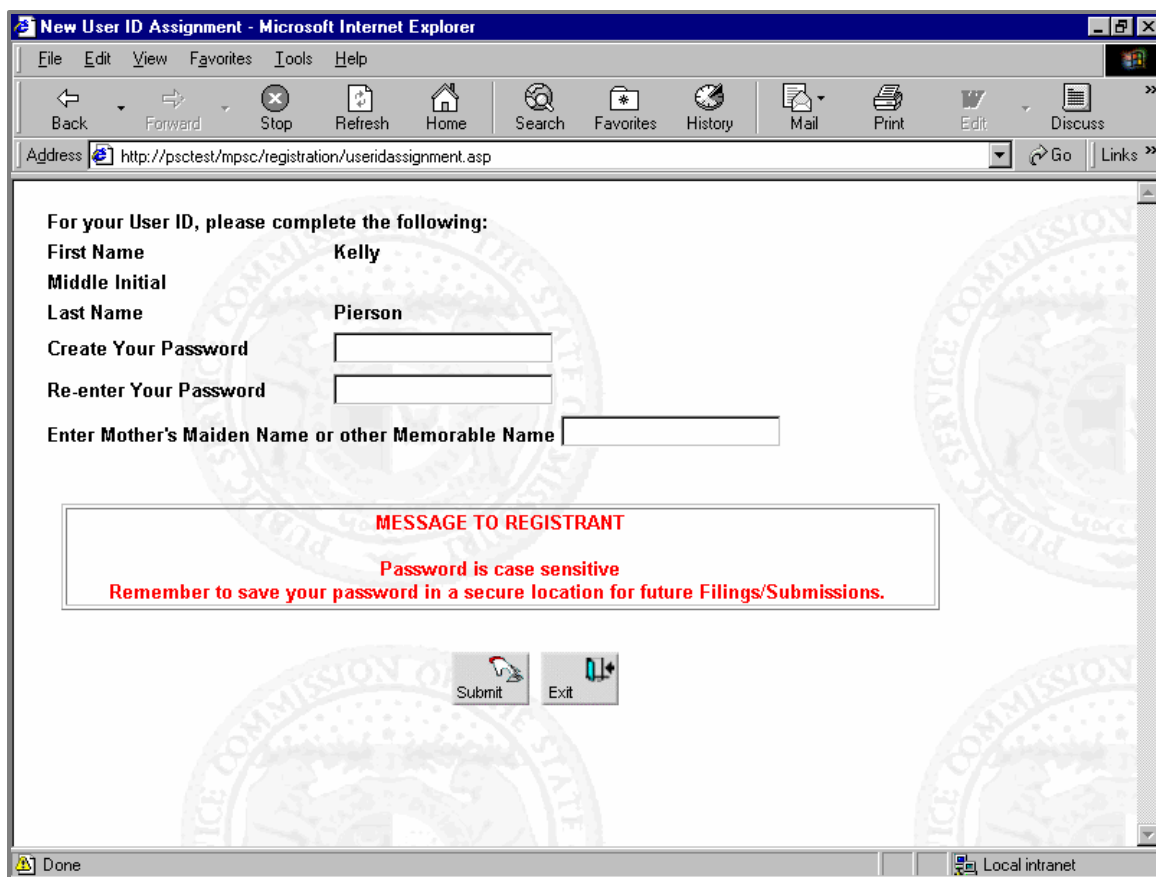
❖ If the company name, first name, last name exists in the system then only the user listed in the initial company registration will be allowed to register as individual for the company.

❖ If an already registered individual wants to register for another company with same User ID then the user must enter the existing User ID in the respective field.

❖ If user is already registered as attorney for the same company then the user will not be allowed to register as individual.

❖ Type the first name and last name same spelling as in Contact Information other wise the system will not allow to register.

If this is a new registration, an "Individual ID" will be generated after the Submit button is pressed. The user will then be taken to the Password Screen. The user should create a password and complete each of the fields and then press the Submit button. A message, "Remember to save your password" will appear. After selecting "OK" the user will be taken to a Result page and will be given a User ID.

<u>Password Screen</u>

When the user presses the Exit button the reminder message, "Remember to save your User ID and password" will appear. Selecting the "OK" button will take the user back to the Registration menu screen.
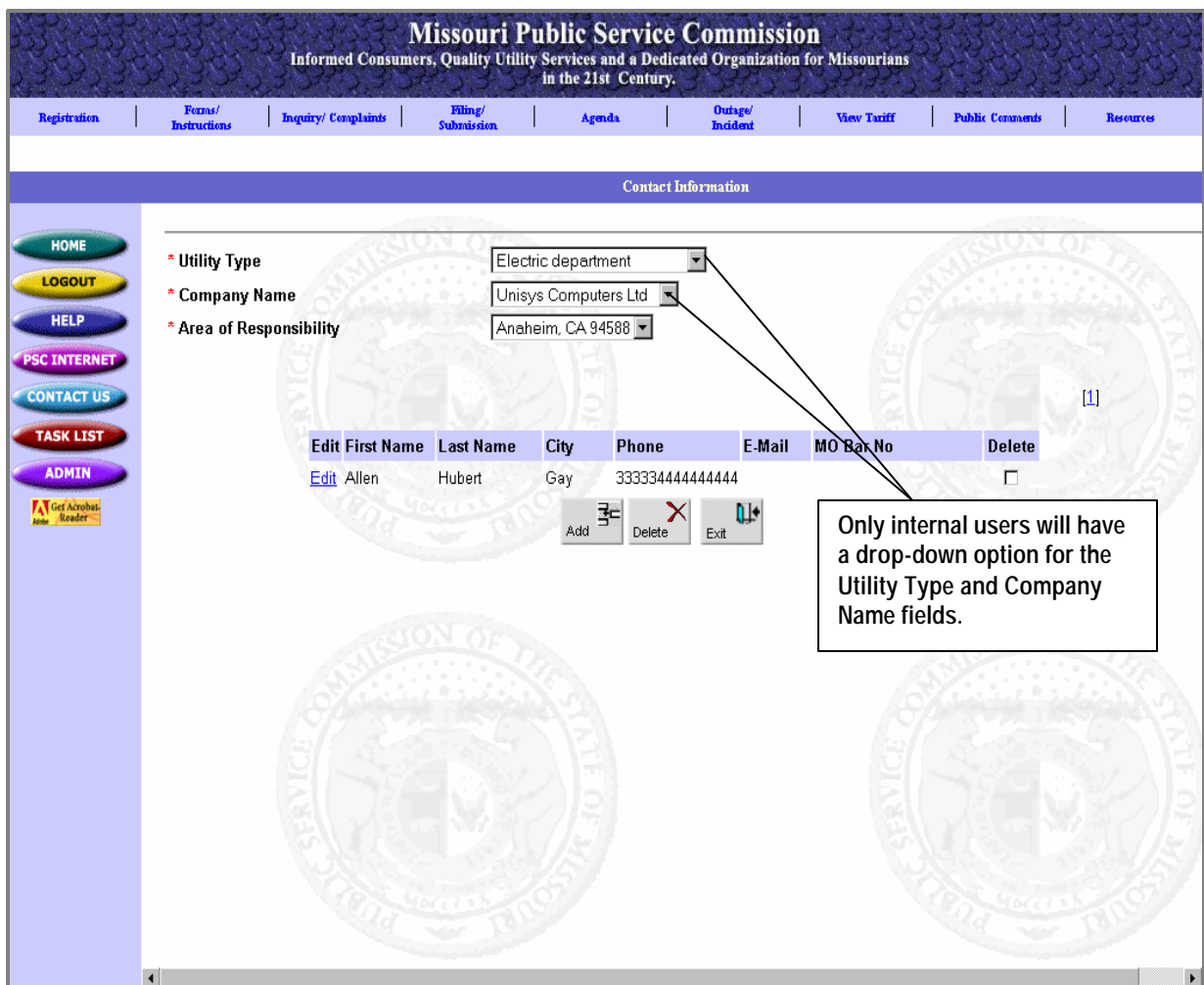
Individual Registration Result Screen
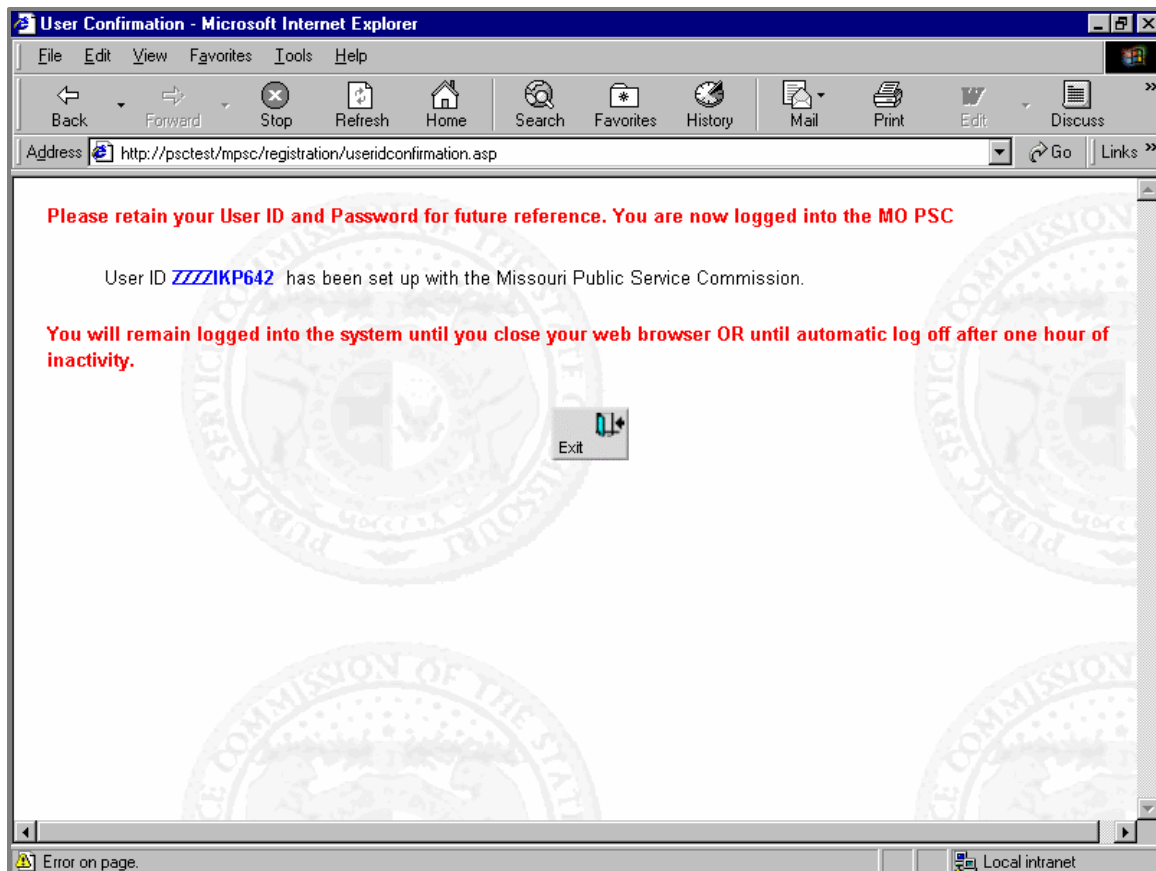
2.3 Contact Information

The Contact Information screen allows registered users and internal staff members to view, add or edit contact detail information for each person belonging to utility company into the system and to get a "Contact-ID". This form must be completed before an attorney can be registered. Only internal users will have a drop-down option for the Utility Type and Company Name fields.

<u>Contact Information Screen</u>

The Contact Information Entry screen is to add or edit contact detail information for each person belonging to the utility company into the system and to get a "Contact-ID". If the user changes information and tries to exit before pressing the Submit button, the message "Do you want exit before submitting?" will appear.

Contact Information Entry Screen

❖ One person can have multiple areas of responsibility for one company.

❖ One person can represent multiple companies.

❖ When internal staff members are logging on, then the user will have to select the utility type, utility company and then the area of responsibility.

❖ When an external user (representative for a company) is logged on, a select list values will be populated as display fields.

2.4   Attorney Registration

The Attorney Registration screen is where a new attorney is registered into CMS and receives their "Attorney ID".

A new Attorney ID is generated internally and the user is taken to the Password screen (see the Password screen on page 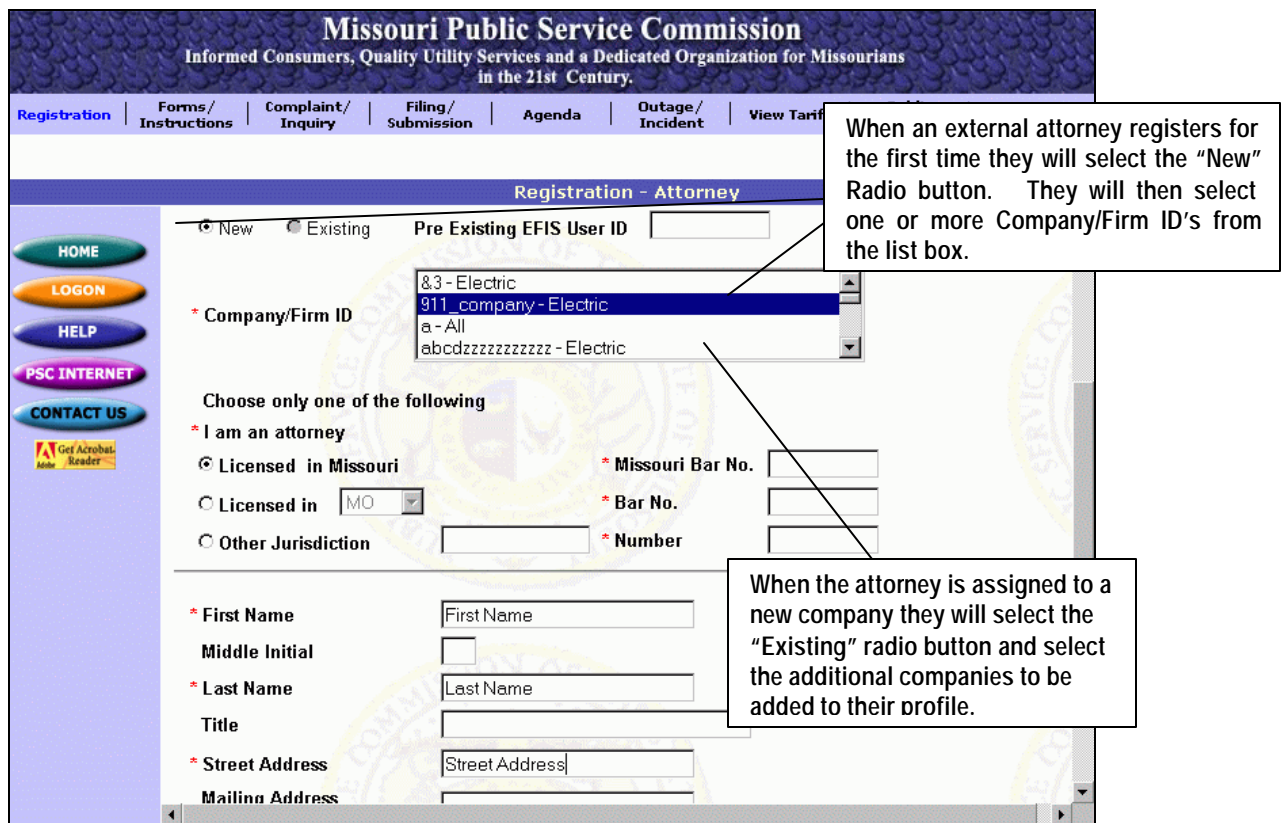15) to create a password. After a password has been created, the user will be taken to a Result screen where they will find their User ID.

Attorney Registration Screen

Missouri Public Service Commission
Informed Consumers, Quality Utility Services and a Dedicated Organization for Missourians in the 21st Century.

| Registration | Forms / Instructions | Complaint / Inquiry | Filing / Submission | Agenda | Outage / Incident | View Tarif |

Registration - Attorney

When an external attorney registers for the first time they will select the "New" Radio button.   They will then select one or more Company/Firm ID's from the list box.

○ New   ○ Existing   Pre Existing EFIS User ID

HOME
LOGON
HELP
PSC INTERNET
CONTACT US
Get Acrobat Reader

* Company/Firm ID

&3 - Electric
911_company - Electric
a - All
abcdzzzzzzzzzzz - Electric

Choose only one of the following
* I am an attorney
○ Licensed in Missouri   * Missouri Bar No.
○ Licensed in MO   * Bar No.
○ Other Jurisdiction   * Number

When the attorney is assigned to a new company they will select the "Existing" radio button and select the additional companies to be added to their profile.

* First Name   First Name
  Middle Initial
* Last Name   Last Name
  Title
* Street Address   Street Address
  Mailing Address

3   Filing and Submission Process

The Filing / Submission section allows a user to electronically file a document with the PSC. Filings are accepted through web, fax or mail. If the filer is filing through web, they will logon into CMS, select Filing / Submission, then New Case Filing and then complete the form. The soft copy of the relevant documents will be sent as an attachment. PSC employees can also enter a case, on behalf of an individual or company, which is received through mail or fax and the documents will be scanned and entered into the system. The PSC staff themselves can file a case.

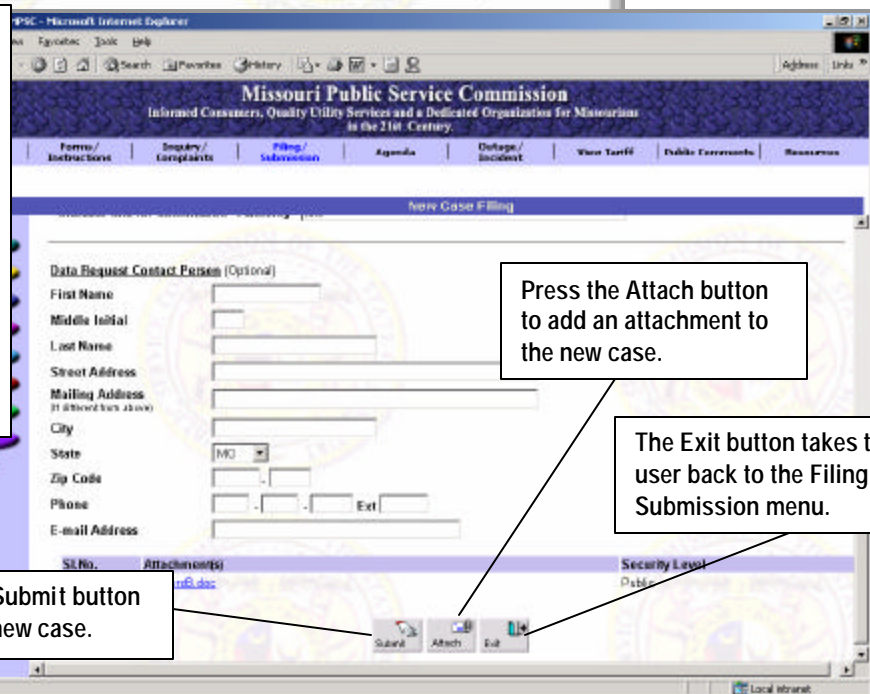**Filing Submission Menu Screen**
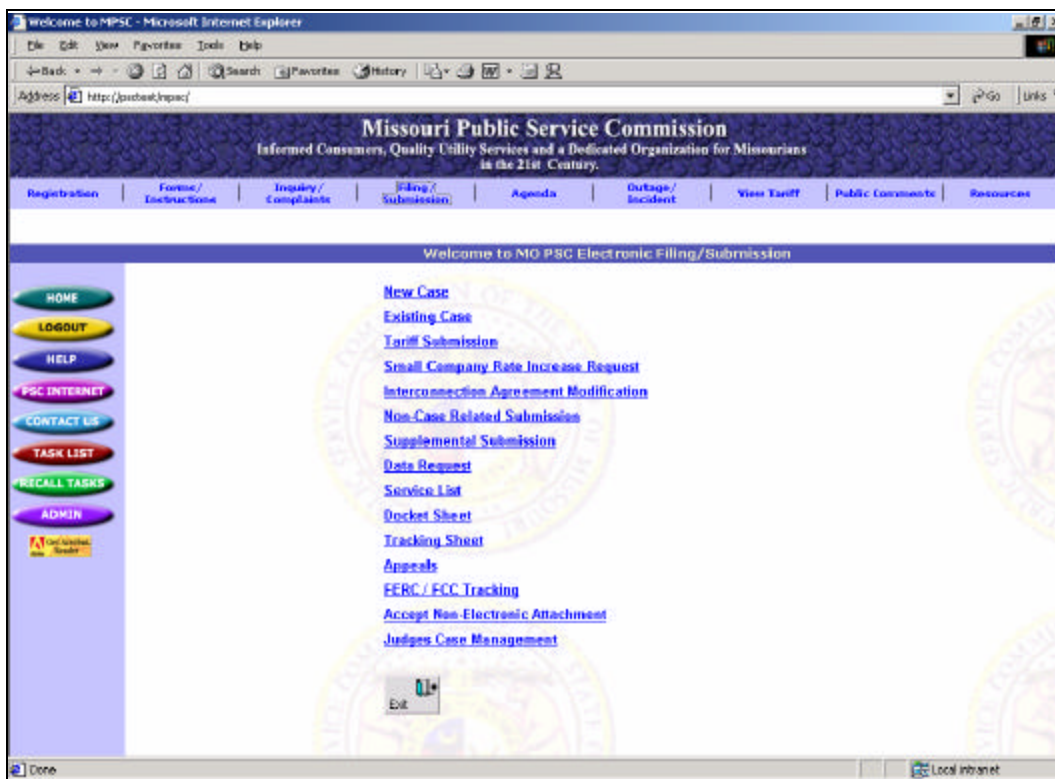
3.1   New Case Filing

This process is to accept the filings in a new case. Filings are accepted through web, fax or mail. If the filer is filing through web, the filer will logon into CMS, select Filing / Submission, then New Case Filing and complete the form. The soft copy of the relevant documents will be sent as an attachment. PSC employees can also enter a case, on behalf of an individual or company, which is received through mail or fax and the documents will be scanned and entered into the system. The PSC staff themselves can file a case.

New Case Filing Screens

Mandatory fields are marked with a red asterisk (*).

If the External Filer files a New Case and selects Type of Case as "Interconnection Agreements " and Type of Filing as " Applications" then only for Utility Types based on Telecommunications (i.e. CLEC, CLEC/IXC.ILEC, IXC & Payphones), the filer has to select the Company 2 Name for the Agreement. The Company 2 Name can either be a Certified Utility Company or can be a non-certified company that is not registered with PSC. The Non-Certified company can be selected by the Manual Override option.

Press the Attach button to add an attachment to the new case.

The Exit button takes the user back to the Filing Submission menu.

Press the Submit button to file the new case.

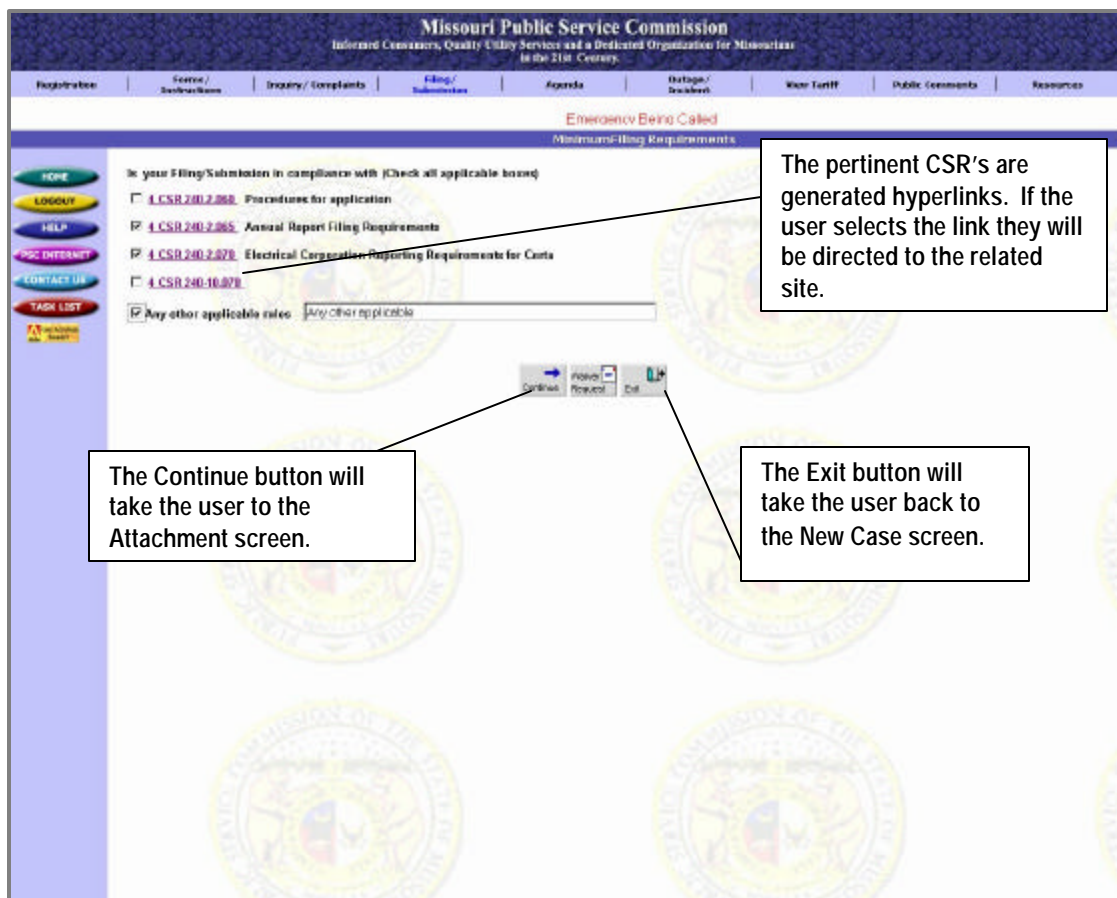| Field / Button	Description
Utility Type	The type of utility must be selected for the case to be filed.
Filing on Behalf of	A single or multiple companies may be selected.
Type of Case	The type of case must be selected from a drop down list.
Type of Filing	The type of filing must be selected from a drop down list.
Related Informal Tracking No.	A related tracking number for the case, such as a Complaint or Inquiry, Tariff, Small Rate Case number, etc. may be entered.
Service Area	This is only applicable if type of case is CLEC. The user can select the service area for the type of case.
Type of Service Offered	One of these boxes must be checked if the type of service for the case is residential, business or prepaid.
Style of Case	The style of the case must be entered. The case style is dependant of the type of case & type of filing filed by the external user and PSC staff filing on behalf of the user. This field will hold up to 1500 characters.
Title of Filing / Submission	The title of the filing and submission must be entered. The title of the filing document submitted by the external user, is dependant on the Type of Case. This field will hold up to 1500 characters.
Clear and Concise Statement of Relief Requested	The Statement of Relief must be entered. Since a case filing is filed based on the type of case & type of filing, the exact relief requested has to be entered by the external filer citing the reasons for the type of filing. This field will hold up to 1500 characters.
Indicate Cite for Commission Authority	The Cite for Commission Authority must be entered. This field will hold up to 55 characters.
First Name	The first name of the data request contact person should be entered. This field will hold up to 15 characters.
Middle Name	The middle initial of the data request contact person should be entered. This field will hold 1 character.
Last Name	The last name of the data request contact person should be entered. This field will hold up to 25 characters.
Street Address	The street address of the data request contact person should be entered. This field will hold up to 25 characters.

Field / Button	Description
Mailing Address	The mailing address of the data request contact person should be entered if it is different from the street address. This field will hold up to 55 characters.
City	The city of the data request contact person should be entered. This field will hold up to 25 characters.
State	The state of the data request contact person should be selected from the drop down list.
Zip Code	The zip code of the data request contact person should be entered.
Phone	The telephone number of the data request contact person should be entered.
Email	The email address of the data request contact person should be entered. This field will hold up to 40 characters.
Sl. No.	Shows the count of attachments. This is a serial identification number column displaying an ascending count of the number of attachments made.
Attachment(s)	Displays the name of each attachment.
Security Level	Shows the security level of the attached document.
Submit	Initially the Submit button is disabled. After the user has filled in the details for the case and attached the required files, the Submit button will be enabled and the user can submit the case. All of the mandatory fields must be completed.
Continue	The mandatory fields are validated. If data has not been entered for one of the mandatory fields then an error messages will appear. After mandatory fields have been completed, the user is taken to the Minimum Filing Requirements screen. There is a Minimum Filing Requirements for each Type of Filing & Type of Case filed by the External User, so the user while filing the Case, is aware of the Minimum Filing Requirements.
Attach	The Attach button can be used after the required documents for the case have been attached and if another document needs to be attached. This button will take the user to the Attachment screen.
Exit	When this button is pressed, the message, "Do you want to exit without submitting?" will appear. If OK is selected, then the user will be taken back to the Filing / Submission menu.

3.1.1 Minimum Filing Requirements

The system will identify the minimum filing requirements depending on type of case and type of utility. The system will generate the minimum requirements (Code of State Regulations -- CSRs) to be fulfilled by the case. A user will check for the CSRs that are generated along with the filing.

Minimum Filing Requirements

Field / Button	Description
Minimum Filing Requirements	All of the minimum filing requirements related to the case must be selected.
CSRs	If this hyperlink is selected, the user will be directed to the related CSR site.
Any other applicable rules	If there are any other applicable rules other than the ones mentioned, this box must be checked. The user must then enter

Field / Button	Description
	applicable rule (up to 20 characters).
Continue	This button takes the user to the Attachment screen.
Waiver Request	If there is not any applicable rule, then this button can be used to take the user to the Waiver Request screen.
Exit	This button will take the user to the New Case Filing screen.

3.1.2   Waiver Request Process

When the Waiver Request button is selected, this screen will appear. If a waiver is requested, then the user is always in compliance with the minimum filing requirements and the system will accept the case. A single waiver can be attached for more than one CSR.

<u>Waiver Request Screen</u>

The Attach Waiver button takes the user to the Attachment screen.

The Exit button takes the user to the Minimum Filing Requirement screen.

Field / Button	Description
If requesting a waiver, please provide the cite for waiver requested and the rationale.	The user has to enter the cite for waiver requested.
Attach Waiver	If the user has attached the cite for the waiver request then the user is taken to the Attachment screen.
Exit	The user is taken to the Minimum Filing Requirement screen.

3.1.3 Attachment Process

This process will be common to many modules. The user can attach either scanned documents or previously saved documents to the current submission by using the Attach button and subsequent options. When all appropriate documents have been attached, the user will select the Done with Attach button. This will return the user to the previous Filing screen. If the user wants to delete an attached document, they can check the box next to the unwanted attachment and then press the Delete button.

Attachment Screens 1 & 2

The user will:
1) Select the Attach button to open the Attachment screen.
2) Click the Browse button and navigate to the desired file's location.
3) Either double-click the file, or click the file once and then click the Open button.
4) Click the Attach button. Repeat steps 2) – 4) until the appropriate and / or necessary files are attached.
5) Click the Done with Attach button to leave the Attachment screen and return to the previous screen.

3.2   Existing Case Process

The process is to accept additional filings for an existing case. If the filing is accepted through web, fax or mail then, depending on the type of filing, the document is routed to the assigned staff member. Depending on the type of filing, the documents are either sent for 'Minimum Requirements' or 'Content Review' or accepted without any check. Accordingly the documents are routed first to the Record Room Staff and then to the assigned staff member.

<u>Existing Case Details</u>

The Submit button will file the case with the Missouri Public Service Commission.

The Attach button will take the user to the Attachment screen.

Field / Button	Description
Enter Case No.	The case number should be entered.
Style of Case	The style of case related to the entered case number will be displayed.
Scanned Documents	This hyperlink is available only to internal users.
Type of Filing / Submission	The Type of Filing / Submission for the case must be selected from the drop down list for the existing case.
Testimony Issue	The Testimony Issue must be selected from the drop down list for the existing case.
Testimony Sub Issue 1	The Testimony Sub Issue 1 must be selected from the drop down list for the existing case.
Testimony Sub Issue 2	The Testimony Sub Issue 2 must be selected from the drop down list for the existing case.
Filing on behalf of	The companies on behalf of which the user is filing the case must be entered.
Title of Filing / Submission	The title of the filing / submission for the existing case must be entered.
Clear and Concise Statement of Relief Requested	The Statement of Relief Requested for the existing case must be entered.
Indicate Cite for Commission Authority	The user must indicate the Cite for Commission Authority for the existing case.
Is this Filing / Submission to meet a scheduled deadline for today?	If the scheduled deadline for the filing / submission is today, the "Yes" box should be checked, otherwise the "No" box should be selected.
Is this a Response to Previous Filing in this case?	If this is a response to a previous filing, the Yes button should be selected and the user will be taken to the Response to Previous Filing screen.
Submit	Initially the Submit button is disabled. After the user has filled in the details for the case and attached the required files, the Submit button will be enabled and the user can submit the case. All of the mandatory fields must be completed.
Continue	Initially the Continue button is enabled. When selected, all of the mandatory fields will be checked and then the user will be taken to the Attachment screen where they can make an electronic and/or non-electronic attachment. If the filing type is a Motion to Intervene, then the user will be directed to the Add Subscriber

Field / Button	Description
	screen. If data has not been entered for one of the mandatory fields then an error messages will appear.
Attach	Initially the Attach button is invisible. The Attach button can be used after the required documents for the case have been attached and if another document needs to be attached. This button will take the user to the Attachment screen.
Exit	The user can exit the existing case by pressing the Exit button.

3.3   Service List

A Service list contains the details of the members who are involved in the case. This process is used and is common for Commission and Appellate cases.

Only authorized internal staff members and external users (based on their User ID) have access to these screens. The user should select the links from the Service List menu bar.

Service List Menu Screen
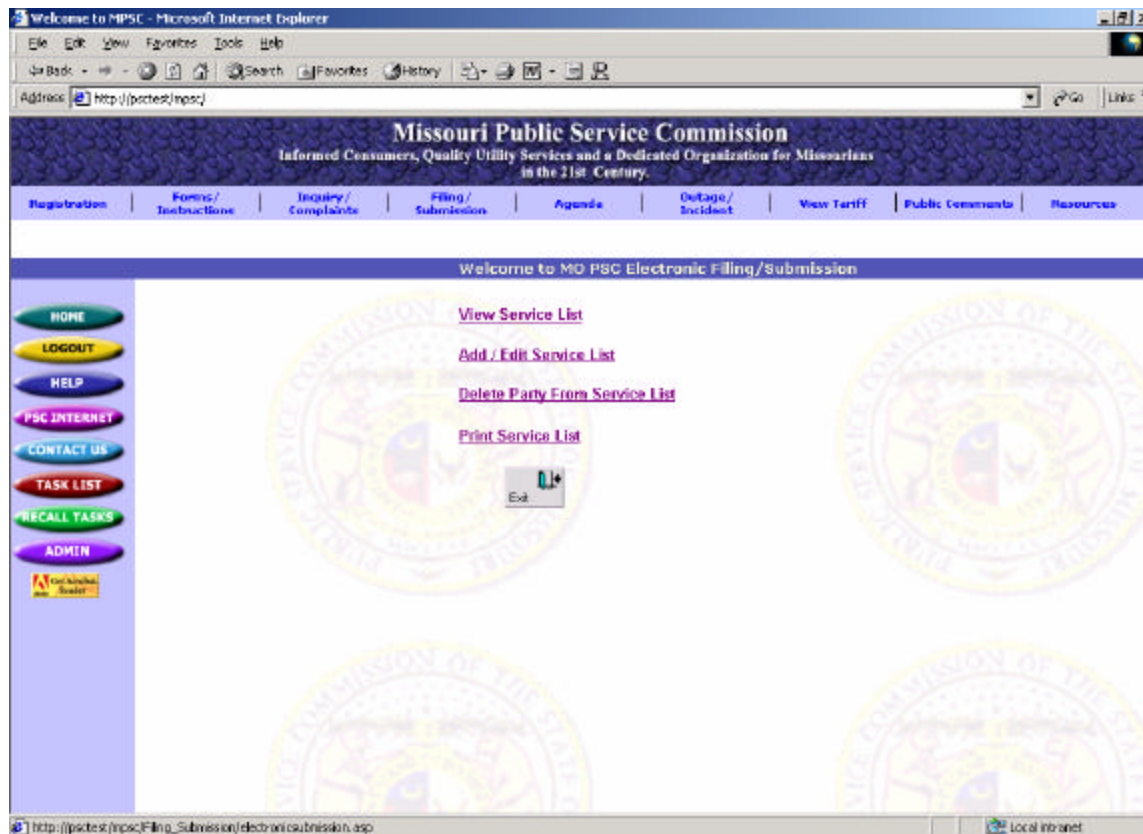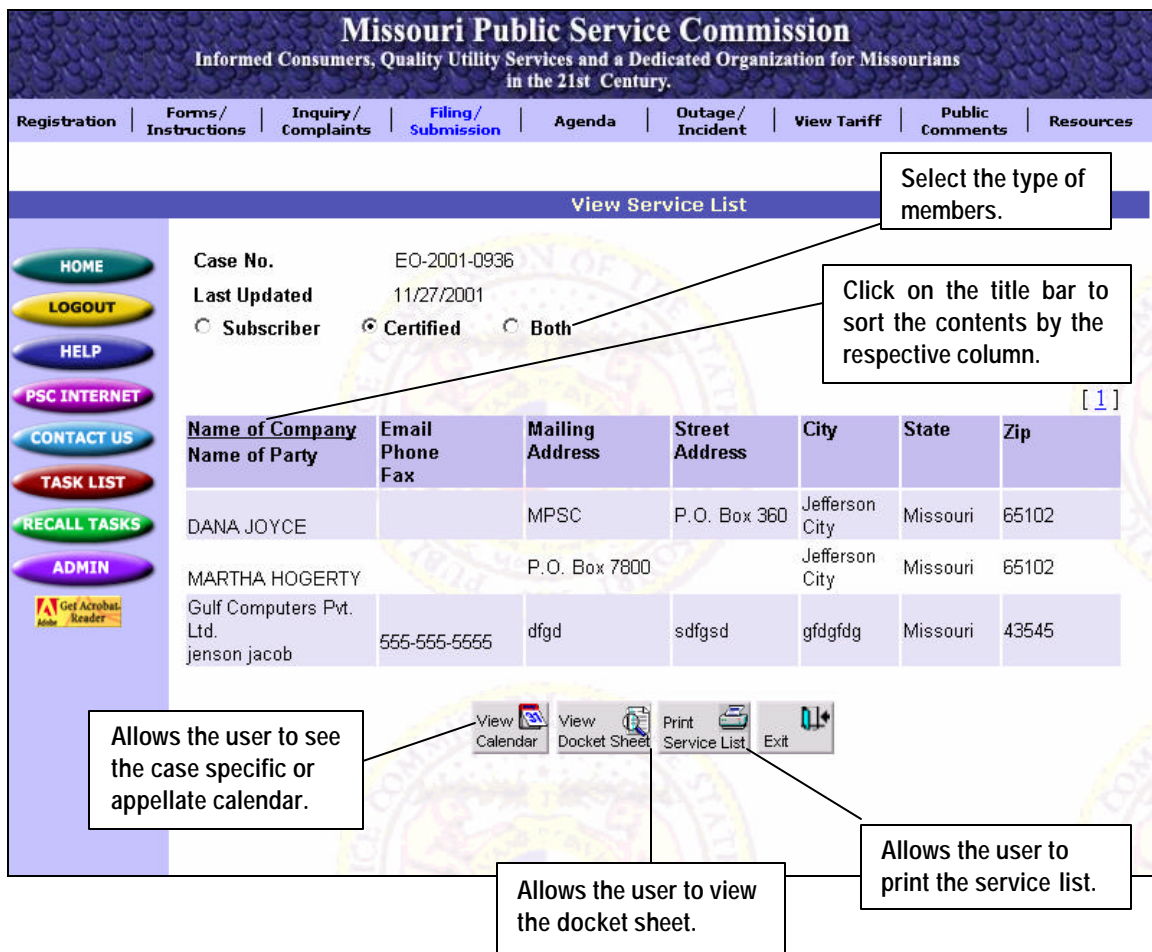
3.3.1 View Service List

This screen is used to view all members of an existing service list for a particular case. (Both external & internal users) The details are displayed according to the case number and the type of members entered by the user. Even the calendar & docket sheet details are displayed according to the case number.

<u>View Service List Screen</u>

Fields	Description
Case No.	Accepts the case number. If the case number is not valid than "Case Number: XXX Does not Exist" message is displayed and if no members are available than "No member Exists".
Last updated date	Displays the last updated date for the case number.
Subscriber or Certified or Both	Allows the user to select the type of the members, if not exists than "No members exists" message is displayed. Default Both option is selected.
Company Name/Name of Party	Upon selecting this field the list is sorted by company name / party name
E-mail/Phone/Fax	Upon selecting this field the list is sorted by E-mail / Phone / Fax
Mailing Address	Upon selecting this field the list is sorted by mailing address
Street Address	Upon selecting this field the list is sorted by street address
City	The list will be sorted by city
State	Upon selecting this field sorts the list by state
Zip	Upon selecting this field sorts the list by zip
Case No.	Accept the case number if case number is not valid than displays the message "No Records Exist" else displays the details of subscriber and certified members.
Subscriber Certified Both	Allows users to select the category of members

3.3.2 Add Subscriber Service List

This screen is used to add / edit / display the subscriber service list details for the entered case number and company name. The generated report can be based on only case number and company name. The case number is entered manually and the company name is selected from the List Box. On search the details are displayed for the selected criteria. The page navigation bar at the top-right hand corner below company name is used to navigate to the next 10 set of records.

<u>View Add/Edit Subscriber Service List Search Screen</u>

Fields	Description
Case No	This field accepts a case number. Enter only alphanumeric characters or an alert message "case no has to alphanumeric characters", will be displayed. The field is 14 characters in length.
Last Updated Date	On tab of a case number, the last updated date is displayed.
Company Name	Select a company name from the list box. Upon selecting a company name, if there are records based on the case number and company name then in the same page the records are displayed below. The user can either add new appeals or update the existing one.
Edit	Select the edit button to go to the edit page to update the record.
Name Of Party	This field displays the name of the contact person.
E-Mail	After selecting this option outlook express will be opened, to send a mail to the required individual.
City	This field displays the city name.
State	This field displays the state name.
Add	Selecting this field will send the user to the Add screen to add a service list.
View Service List	Selecting this field will send the user to the view service list screen.
Exit	If the document is not submitted then the message " Do you want to exit, without submit " is displayed. On click of OK goes to the Service List menu.

This screen is used to add a new subscriber service list for a user-specified case number and company name.

Add/Edit Subscriber Service List Screen

Fields/Button	Description
Case no	Displays the case number from the previous screen.
Last Updated Date	Displays the last updated date.
Company Name	Displays the company name.

Fields/Button	Description
First Name	Enter the first name. It is a mandatory field.
Middle Initial	Enter the middle initial.
Last Name	Enter the last name. It is a mandatory field
Mailing Address	Enter the mailing address.
Street Address	Enter the street address.
City	Enter the city name.
State	Select a value from the state list box.
Zip Code	Enter a zip code, numeric, format 5 or 5 – 4.
Phone	Enter a phone number, format 3-3-4
Ext.	Enter an extension number, not a mandatory field. Five digits in length.
Fax	Enter a fax number, format 3-3-4
Email	Enter the email ID.
Submit	The following messages will be displayed if data is missing or inaccurately entered: ❖ "First Name cannot be left blank". ❖ "Last Name cannot be left blank". ❖ "invalid Zip Code – format 5 or 5 - 4" ❖ "invalid Phone No format 3-3-4". ❖ "invalid Fax No format 3-3-4". ❖ "Invalid E-mail ID". i.e. Paul@hotmail.com. If valid data is entered, then it inserts/updates a record and displays a message "Record Saved Successfully".
Clear	Select this button and all the text boxes are cleared.
Exit	If the document is not submitted then the message " Do you want to exit, without submit " is displayed. If OK is selected it will take the user the Add/Edit Service List menu.

3.3.3   Print Service List

This screen is used to print the service list details for the entered case for subscribers or certified or both. The generated report can be based on the selected criteria such as party's name, company's name etc. The print format can be either a List or Label or Envelope. When previewing the report is displayed for the selected criteria in front of the user.

Print Service List Initial Screen

Fields	Description
Case No.	This field accepts a case number. Enter only alphanumeric characters or it displays alert message "Invalid Case No." will appear.
Last Updated Date	When a case number is typed in, the last updated date for the case will be displayed.
Name Of Party	This field will display the name of the party, this selection is mandatory.
Company Name	This field will display the company name, this selection is mandatory.
Street Address	This field will display the street address, this selection is mandatory.
Mailing Address	This field will display the mailing address, this selection is mandatory.
City	This field will display the city, this selection is mandatory.
State	This field will display the state name, this selection is mandatory.
Zip	This field will display the zip code, this selection is mandatory.
Phone	This field will display the phone number, this selection is mandatory.
Fax	This field will display the Fax no, this selection is mandatory.
Email	This field will display the email, this selection is mandatory.
All	This field will display all the details this selection is mandatory.
List	This field will display the details in a list format, this selection is mandatory.
Mass mailing message	Mass mailing message text area get enabled if list option is selected. Enter the mailing message.
Label	This field will display in a label format, this option selection is mandatory.
Avery 2 column Label # 5160	This field will display in a Avery 2 column label #5160, this selection is mandatory.
Avery 3 column Label # 5162	This field will display in a Avery 3 column label #5162, this selection is mandatory.
Envelope #10	This field will display in a Envelope #10 format, this selection is mandatory.
Print	This button opens a print window and allows the user to print the document.

Fields	Description
Preview	This button takes the user to the Preview Service List screen.
Exit	This button takes the user to the Service List Menu screen.

Upon selecting the Envelope #10 radio button. It will display the following screen for envelope. It displays the data of the options selected from search page.

<u>Print Service List Result Screen - Envelope</u>

Upon selecting the Label radio button and type Avery 2 column Label # 5160. It displays the data for the options selected from the search screen.

Print Service List Result Screen - Label

Upon selecting the Label radio button and type Avery 3 column Label # 5162. It will display the following screen for Label of 3 column. It displays the data for the options selected from the search screen.

Print Service List Result Screen - Label

Fields/Button	Description
Case No.	This field displays the case number.
Last Updated Date	This field displays the last updated date.
Name Of Party	This field displays the name of the party, if selected in the Search screen.
Company Name	This field displays the company name, if selected in the Search screen.
Street Address	This field displays the street address, if selected in the Search screen.
Mailing Address	This field displays the mailing address, if selected in the Search screen.
City	This field displays the city name, if selected in the Search screen.
State	This field displays the state name, if selected in the Search screen.
Zip Code	This field displays the zip code, if selected in the Search screen.
Phone	This field displays the phone number, if selected in the Search screen.
Fax	This field displays the fax number, if selected in the Search screen.
Email	This field displays the email ID, if selected in the Search screen.
Back	This button returns the user to the previous page.
Exit	This button returns the user to the Main Menu screen.

3.4   Docket Sheet Process

This option is used to search for the list of all of the filings received for a particular case. The screen displays all the details like company names, status, consolidated to and from case numbers if existing, appealed from case number along with their item number details. Even the calendar & service list details are displayed according to the case number.

Docket Sheet Search Screen

Docket Sheet Result Screen

3.5   Small Company Rate Increase Proceeding

An External Filer can file a Small Company Rate Increase for only Water, Sewer & Gas utilities i.e only the following Utility Companies can file these request. Psc Staff can file on behalf of these utility companies.   The filing is accepted and send to the concerned Utility Department for processing on submit of the form.

Small Company Rate Increase Screen

Fields	Description
Utility Type	Select the utility type from a dropdown list.
Amount of Additional Revenue Requested	Fill in the dollar amount of additional revenue requested.
Reason for Proposed Change	Type in the reason for the requested rate increase.
First Name	The user will enter the first name of the contact person up to 15 characters.
Middle Initial	The user will enter the middle initial of the contact person.
Last Name	The user will enter the last name of the contact person up to 25 characters.
Company Name	The user can select the company name from a dropdown list.
Street Address	The user will enter the street address of the contact person up to 55 characters.
Mailing Address	The user will enter the mailing address of the contact person up to 25 characters.
City	The user will enter the city of the contact person up to 25 characters.
State	The user will select the state of the contact person.
Zip Code	The user will enter the zip code of the contact person.
Phone	The user will enter the phone number of the contact person.
Fax	The user will enter the fax number of the contact person.
Email	The user will enter the email of the contact person up to 40 characters.
Sr. No.	Displays the serial identification numbers of the attachments.
Attachments	Displays the description of the documents attached. If it is a non-electronic attachment there is no "hyperlink". If it is an electronic attachment, a window opens allowing the user to view the document.
Security Level	Displays the security level of the documents.

Fields	Description
Submit	Select all the required fields and make any attachments, and then select the Submit button.
Continue	This button takes the user to the Attachment screen when attachments are to be made for the first time.
Attach	This button takes the user to the Attachment screen to make more attachments.
Exit	This button takes the user back to the Filing Submission Menu screen.

3.6   Non-Case Related Submissions

This option allows users to submit documents that are not related to the commission cases. Non Case Related Reports such as PSC MO Annual Report, Telecommunications Service Quality Reports are some of the non case submissions filed by the External filer . PSC staff can also file on behalf of the External Utility companies.

Non–Case Related Submission Screen

Press the Submit button to submit the form.

Press the Attach button to go to the Attachment Screen.

Press the Exit button to go to the Filing Submission menu.
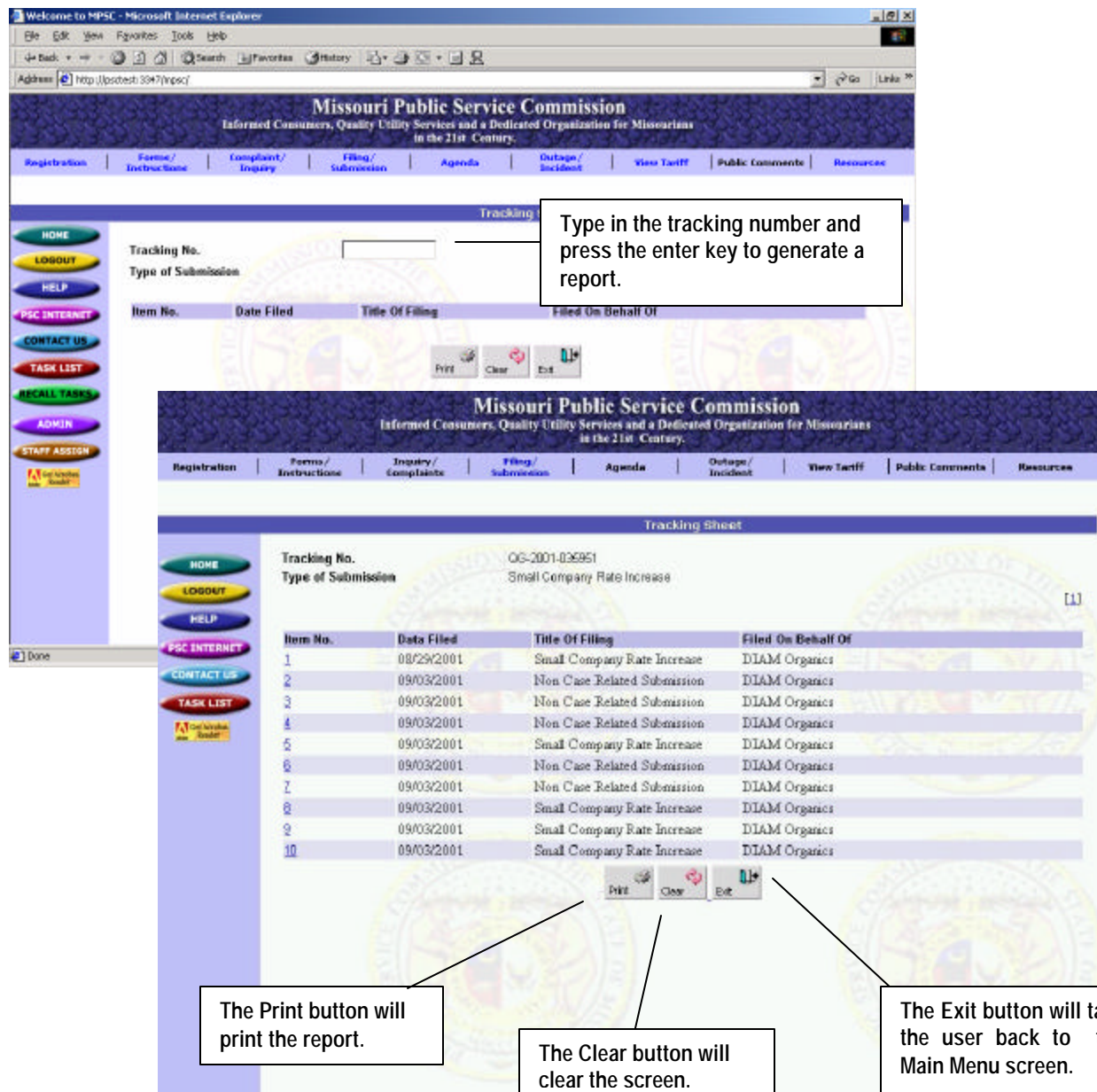
Fields	Description
Scanned Documents	Hyperlink is displayed only if the user is Internal, once the attachment is made the link is invisible. Goes to Scanned Documents screen where a list of scanned documents is displayed.
Type Of Utility	Select the Type of Utility.
Company	Select the Company Name.
Type Of Submission	Select Type Of Submission.
Date Of Report	Accepts date in MM/DD/YYYY format.
Applicable Case No.	Accepts the case number.
Comments	Accepts comments for the submission.
Sl. No.	Displays the serial numbers of the attachments.
Attachment(s)	Displays the description of the documents attached. Click on the attachment opens the document for viewing.
Security Level	Displays the security level of the documents.
Submit	Select Utility Type, Company, Type of Submission, make attachment and then click on Submit.
Continue	Goes to the attachment screen when attachments are to be are to be made for the first time. (Refer Common functions).
Attach	Goes to the attachment screen to make more attachments. (Refer Common functions).
Exit	Goes to the Filing Submission menu.

3.7   Tracking Sheet

The Tracking Sheet screen displays the details like type of submission, date filed, title of filing, company names of a particular tracking number.

<u>Tracking Sheet Screen</u>

The screen callouts read:

Type in the tracking number and press the enter key to generate a report.

The Print button will print the report.

The Clear button will clear the screen.

The Exit button will take the user back to the Main Menu screen.

Field/Button	Description
Tracking No.	Enter the tracking number if it is a textbox or displays the tracking number if it is a label. If the tracking number does not exist, then the message "Tracking Number ##### Does Not Exist" will be displayed.
Type of Submission	This field displays the type of submission of the particular tracking number.
Item No.	This field displays the item number for the particular tracking number.
Data Filed	This field displays the Data Filed of the particular tracking number.
Title Of Filing	This field displays the title of filing of the particular case number.
Filed On Behalf Of	This field displays the name of the company on whose behalf the filing took place of the particular case number.
Print	Upon selecting this button the print screen is opened.
Clear	Upon selecting this button the contents of the screen are cleared.
Exit	This button allows to user to exit from current screen.

3.8   Data Request Process

This option is used for generating a new data request. Both internal and external users can generate data requests. When a data request is developed by an external user, a work item is created and routed to the inbox of the internal Public Service Commission user whose email ID is entered in the Requested from email data entry field. The Develop and Respond options are available to the external users.
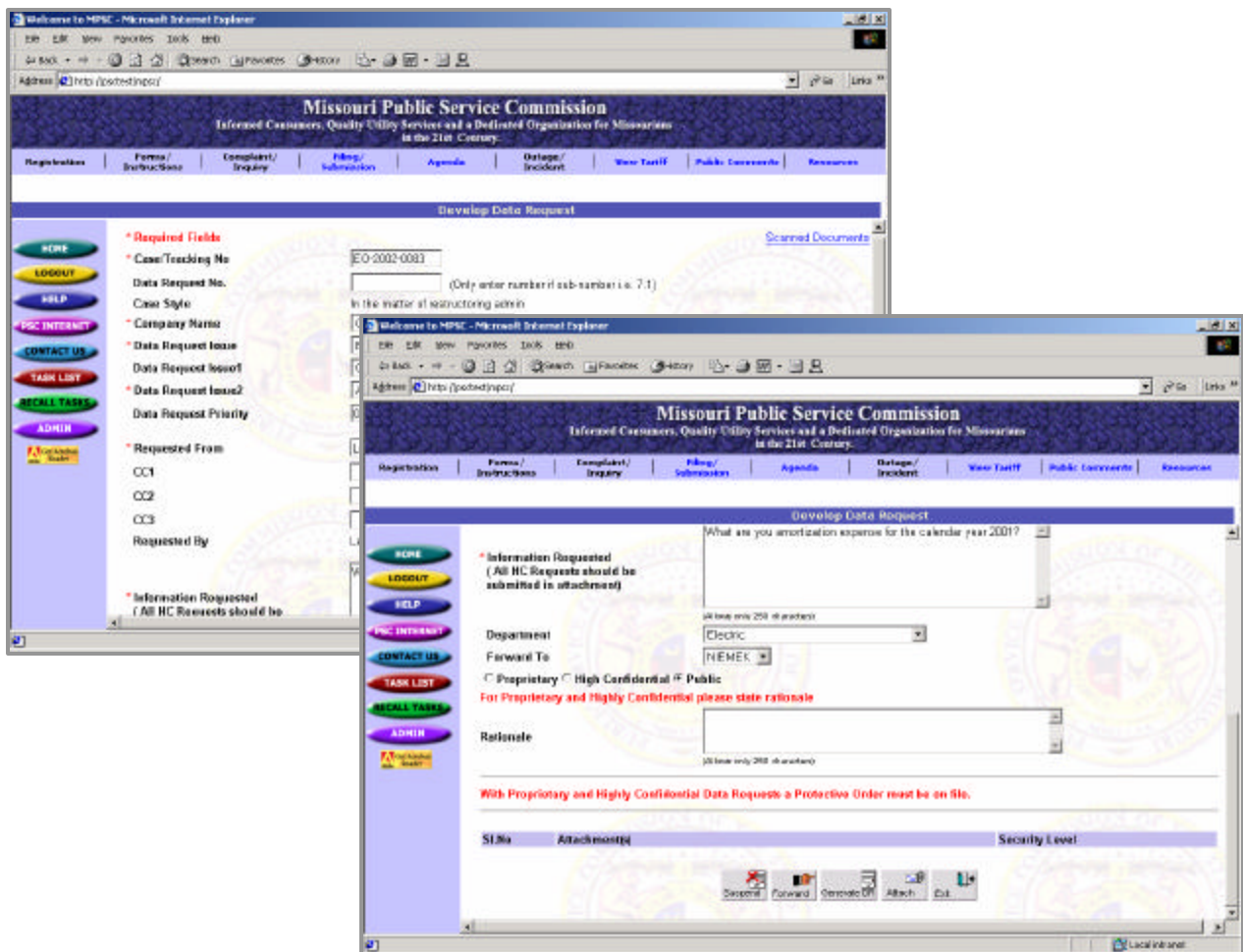
<u>Data Request Menu Screen</u>
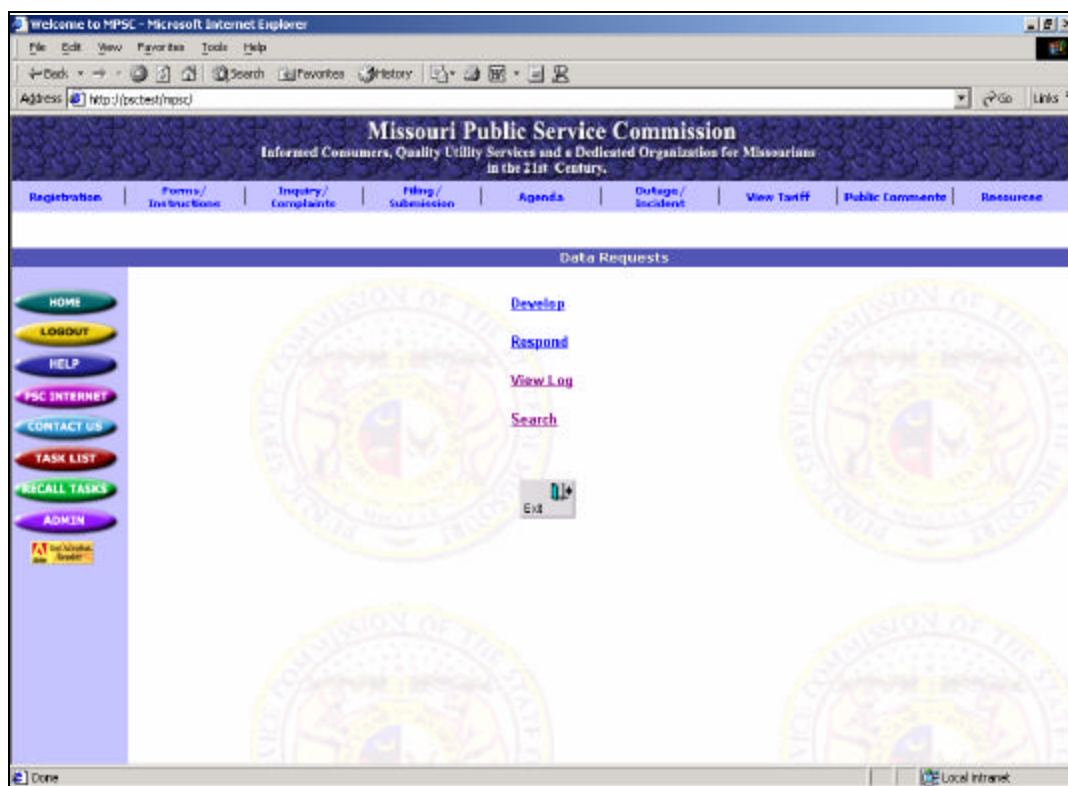
3.8.1 Develop Data Request Process

The user can manually enter the Data Request number, if the number is a sub-number (e.g. 5601.1) used to associate it with a previously generated DR (i.e., numbered 5601). If the user does not enter the Data Request number then the Data Request number will be generated depending upon the department/company to which the user belongs.

Develop Data Request Screens

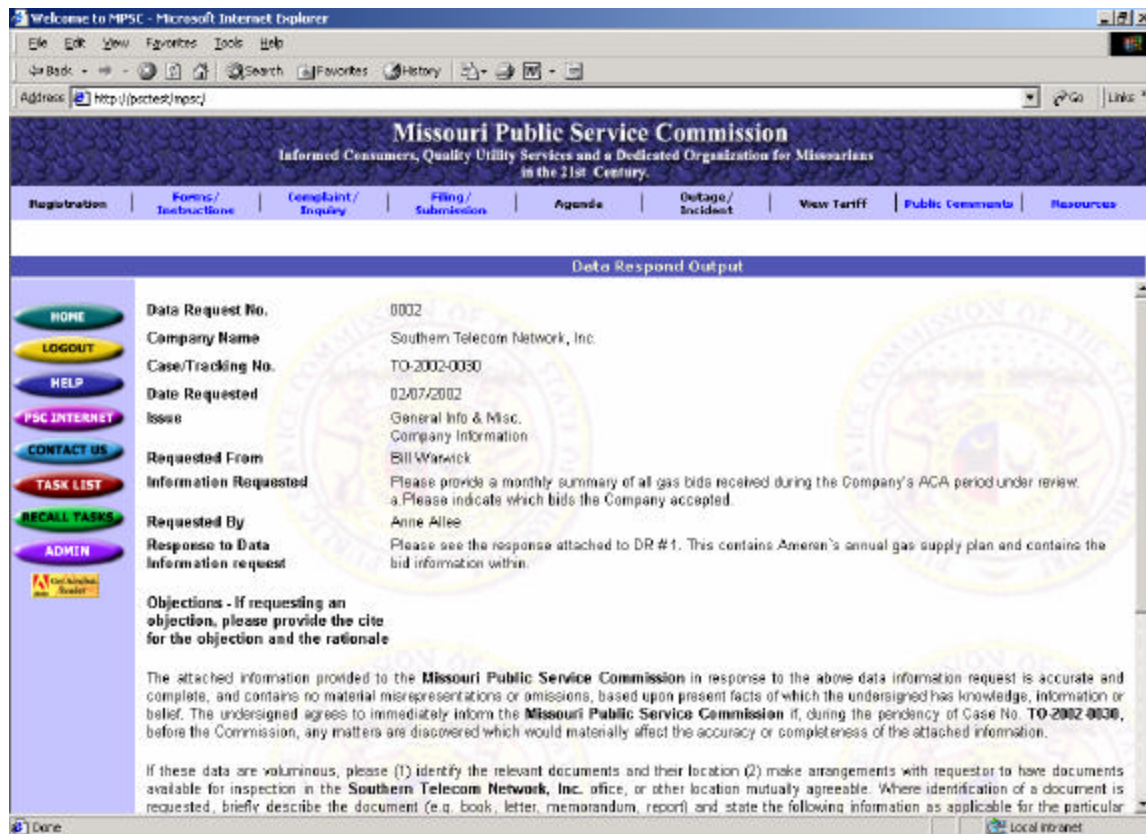| Field / Button	Description
Case / Tracking No.	The user must enter an existing Case / Tracking number.
Data Request No.	The user can manually enter the Data Request number, if the number is a sub-number (e.g. 5601.1). If the user does not enter the Data Request number then the Data Request number will be generated depending upon the department to which the user belongs.
Case Style	Displays the Case Style.
Company Name	The user can select the company from a drop down menu. If the user does not select a Company Name then a message "Company Name cannot be blank." will appear.
Data Request Issue	The user can select a Data Request issue from the drop down menu. If the user does not select a Data Request Issue then a message "Data Request Issue cannot be blank." Is displayed.
Data Request Issue 1	Allows user to select DR Issue 1 from the available options. If the user does not select a Data Request Issue 1 then a message "Data Request Issue 1 cannot be blank." is displayed.
Data Request Issue 2	Allows user to select DR Issue 2 from the available options. If the user does not select a Data Request Issue 2 then a message "Data Request Issue 2 cannot be blank." Is displayed.
Date Request Priority	Accepts Request Priority Date.
Requested From	Accepts the name of the person who will be responding to the request being made. If the user does not enter any value then a message "Request from cannot be blank." is displayed.
Requested Email	Accepts the Email ID of the person who will be responding to the request being made. If the user does not enter any value then a message "Request Email cannot be blank." is displayed.
CC1	Accepts the name of person to who mail (CC) will be sent.
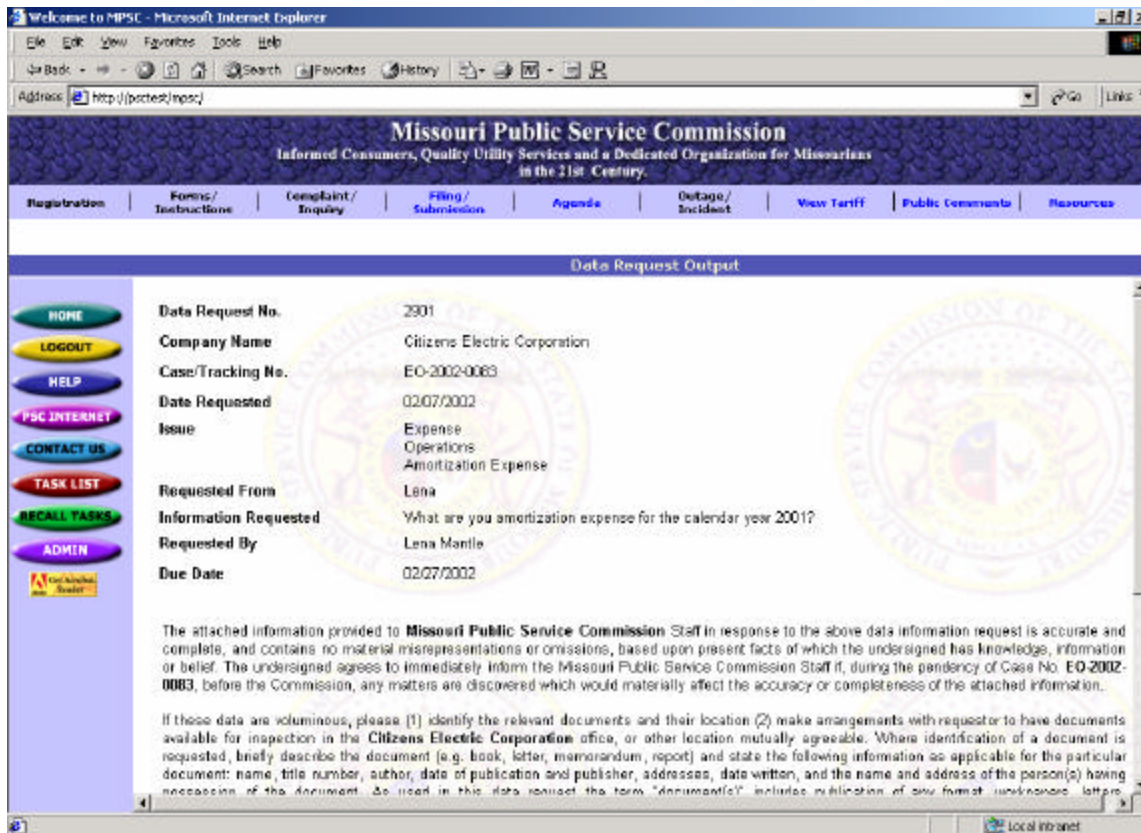
Field / Button	Description
Email	Accepts the email ID of person to who mail (CC) will be sent.
CC2	Accepts the name of person to who mail (CC) will be sent.
CC3	Accepts the name of person to who mail (CC) will be sent.
Information Requested.	This field is where the user enters the information requested. If the user does not enter any value then a message "Information Requested cannot be blank." is displayed.
Department	This field allows the user to select a department from a drop down menu.
Forward To	This allows the user to select a user ID from a drop down menu. The user ID's are populated depending upon the department selected.
Security	There are three levels of Security (Proprietary, Highly Confidential, and Public). Public is the default.
Rationale	If the security selected is either proprietary or highly confidential, then the user can enter the Rationale.
Continue	When this button is selected, the user is taken to the Attachment screen for attaching either electronic or non-electronic documents.
Exit	If the document is not submitted then the message "Do you want to exit, without submit" is displayed. When "OK" is selected, the user is taken back to the Data Request menu.

When the user selects the Generate Data Request option, after filling out the form, the user is shown the following screen. The user can then Submit or Print the form using the buttons at the bottom of the page.

Data Request Output

This is what the Data Request looks like when it is sent by email.

Data Request Email Screen
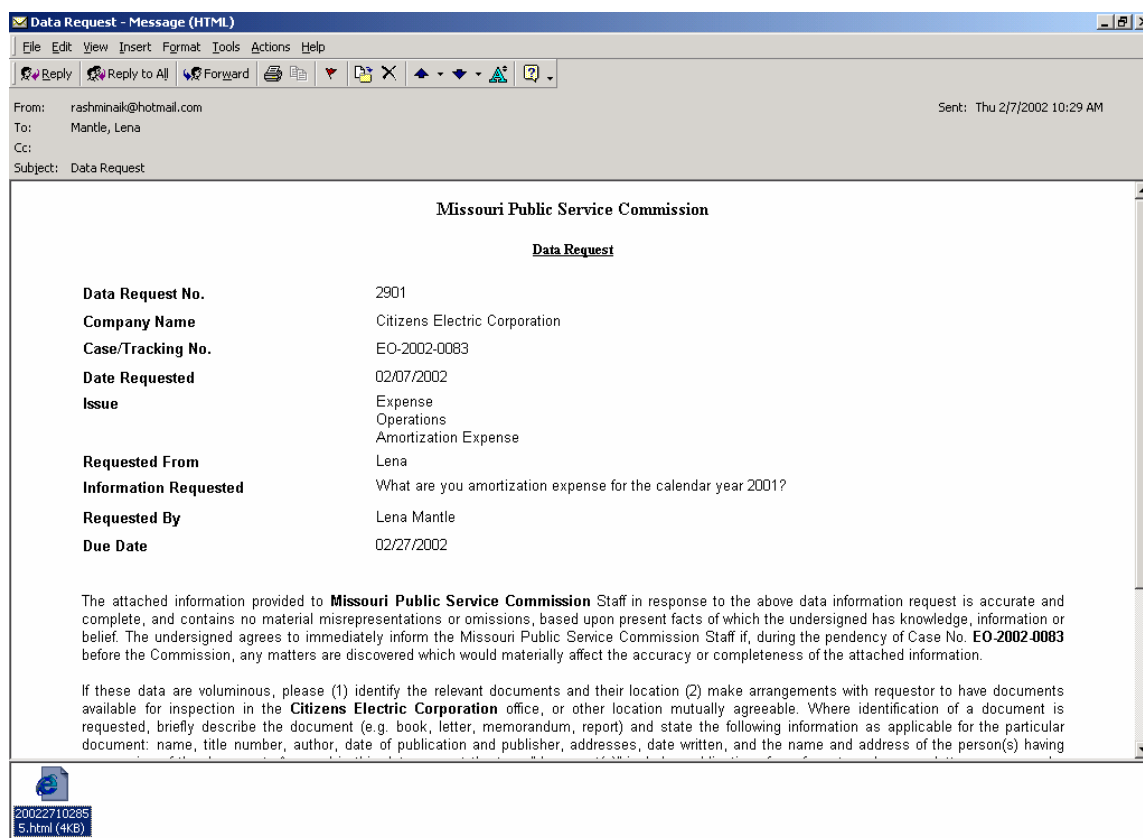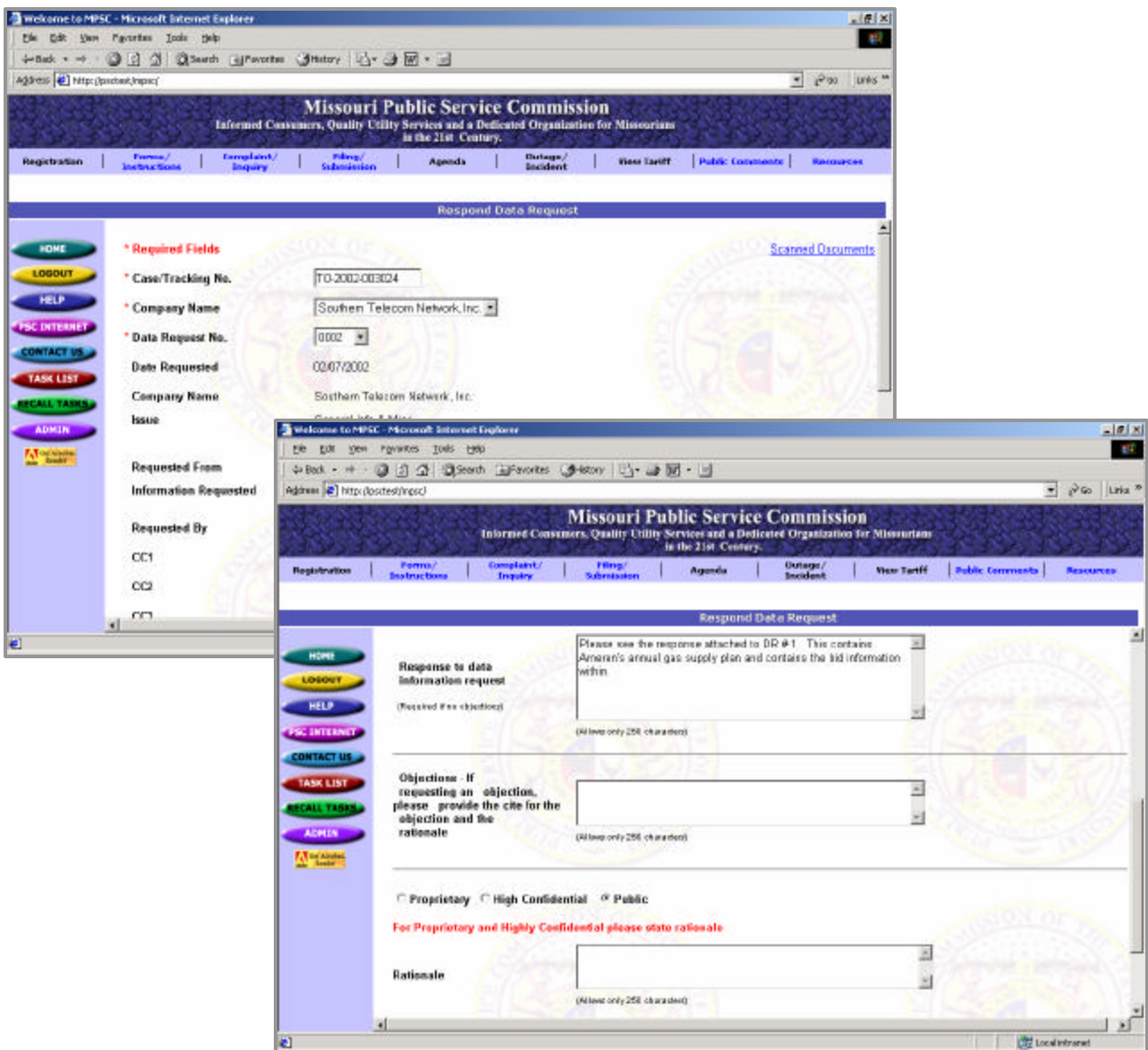
Field / Button	Description
Data Request No.	Displays the data request number.
Company Name	Displays the company name.
Case No.	Displays case / tracking number
Requested From	Displays the name of person who made the request.
Date Requested	Displays data request date.
Due Date	Displays when the response is expected.
Information Requested	Displays the information requested.
Requested By	Displays the name of the person making the request.
Security	Displays the data request security.
Rationale	Displays the rationale.
Submit	When selecting the Submit button, the message, "Press OK to submit or Cancel to review all data entered before final submission" will appear. When the user selects the "OK" button, then the request is generated.
Print	Selecting the Print button allows the user to print the form currently displayed in the browser.

3.8.2   Respond Data Request Process

This option is used for generating a response for an existing data request. A DR Respond can be generated by both internal and external users. For a single DR number, multiple responses can be made, and all of the multiple responses are shown on a single work item. When the DR Respond is developed by an internal user, an email is sent to all of the external user's whose email ID's are entered in the email data entry field's on the screen. If the DR Respond is developed by an external user, then a work item is created and routed to the inbox of the internal user who had made that request.

Respond Data Request

Field / Button	Description
Case Tracking No.	The user has to enter an existing case or tracking number. If the user does not enter a Case/Tracking number the the message "Case/Tracking cannot be blank." will be displayed. If the entered Case/Tracking number does not exist, then the message "Entered Case/Tracking No does not exist." will be displayed.
Company Name	This field allows the user to select a company from the available option. If the user does not select a company, then the message, "Company name cannot be blank." will be displayed.
Data Request No.	Accepts the data request number. ❖ If the case is closed the following message is displayed: "Case corresponding to entered Data Request number is closed." ❖ If the user is not authorized to respond then "You are not authorized to respond." message will be displayed. ❖ If it is a resolved case then "Data Request Resolved, Cannot respond." message will be displayed. ❖ If request is made already for the entered DR no then "Request already received, cannot respond again." message will be displayed.
Date Requested	Displays data request date.
Company Name	Displays the company name.
Issue	Displays the issue.
Requested From	Displays the name of person who made the request.
Information Requested	Displays the information requested.
Requested By	Displays the name of the person making the requested.
CC1	Accepts the name of person to whom mail will be copied.
Email	Accepts the email ID of person to whom mail will be copied.
CC2	Accepts the name of person to whom mail will be copied.

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Field / Button	Description
CC3	Accepts the name of person to whom mail will be copied.
Response to date information requested.	Accepts user response. If the user does not complete this field, then the message, "Response to data cannot be blank." will be displayed, however if any objection is taken, then this field can be left empty.
Objections	Accepts user objection.
Security	Displays the data Respond security (Proprietary, Highly Confidential, Public).
Rationale	Accepts rationale. If security selected is either proprietary or highly confidential, only then the user can enter the rationale.
Respond DR	Selecting this launches the Data Respond output screen to show all the details.
Attach	After the user has attached the required documents for the case and wants to attach some more documents, the user can do this by using the attach button. The user is taken to the attachment screen.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will be displayed. When "OK" is selected, the user is taken back to the Data Request Menu screen.

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When the user selects the Respond DR option, after filling out the form, the user is shown the following screen, where the user can then Print or/and Send the data response.

Data Respond Output

Field / Button	Description
Data Request No.	Displays data request number.
Company Name	Displays the company name.
Case No.	Displays case / tracking number.
Requested From	Displays the name of person who made the request.
Date Requested	Displays data request date.
Due Date	Displays when the response is expected.
Information Requested	Displays the information requested.
Requested By	Displays the name of the person making the requested.
Security	Displays the data respond security.
Rationale	Displays rationale.
Submit	When this button is selected, the message, "Press OK to submit or Cancel to review all data entered before final submission" will be displayed. When the user selects the "OK" button, then the response is generated.
Print	This button will allow the user to print the form currently displayed in the browser.

3.9   Supplemental Submission

This option allows the user to submit the Supplemental Submissions to Small Company Rate Increase, Interconnection Agreement and Non-Case Related type of submission. PSC Staff can file on behalf of these utility companies. The filing is accepted and send to the concerned Utility Department for processing on submit of the form.

Supplemental Submission Screen

This hyperlink will allow the user to view the document.

The Submit button will file the Submission.

The Continue button will take the user to the Attachment screen.

The Attach button will take the user to the Attachment Screen.

The Exit button will return the user to the Filing Submission screen.

Fields	Description
Scanned Documents	Applicable only to internal users, once the attachments are made the link is invisible.
Tracking No.	Enter the Tracking Number.
Utility Type	Displays the description of the utility type.
Type Of Submission	Displays the type of submission.
Title of Filing	Accepts the type of submission of the specific tracking number. It is a multiple selection.
Filing On Behalf Of	Select the Filing On Behalf Of value.
Serial No.	Displays the serial numbers of the attachments.
Attachments	Displays the description of the documents attached. If it is a Non-Electronic there is no "Hyperlink" If it is an Electronic attachment, it opens view document in a new window.
Security Level	Displays the security level of the documents.
Submit	Select all the required fields and make attachment and then click on Submit. If the tracking number is not selected then the message "Tracking No. cannot be blank" will be displayed. If the Title of the Filing is left blank, then the message "Title of filing cannot be blank" will be displayed. If Filing on Behalf Of is not selected then the message "Filing On Behalf Of has to be selected" will be displayed.
Continue	This button takes the user to the attachment screen when attachments are to be are to be made for the first time.
Attach	This button takes the user to the attachment screen to make more attachments.
Exit	This button takes the user back to the Case Management Report menu.

3.10   Interconnection Agreement Process

An Interconnection Agreement Modification filing can be filed only by Telecommunication based Utility Compani4s. This option is not available for Utility Types other than Telecommunications. Public Service Commission staff members can file Interconnection Agreement Modifications on behalf of External Telecommunication Utility Companies. If the Collocation Appendix option is selected by the filers, then only a notification of the filing goes to the concerned user and no workflow activity is initiated.

The Continue command button will allow the user to attach the necessary document(s) in order to see the below three command buttons.

Interconnection Agreement Screen

The Attach button will take the user to the Attachment screen.

Fields	Description
Scanned Documents	This is applicable only to internal users. Once attachments are made, this link is invisible.
Case No.	Enter the Case No. If the Case No. does not exist, then the message "Case Number does not exist" message is displayed.
Utility Type	Displays the Utility Type description
Company Name 1	Displays the name of the first company to be a party to the agreement.
Company Name 2	The user will select this company name from the drop-down list box. This company will be a party to the agreement.
Manual Override	Check this when the company to be a party to the agreement is not listed in the drop-down list box. The user will then enter the name of the company.
Summary of Changes	The user will enter a synopsis of the changes here.
Sr. No.	The serial number of each attachment
Attachments	Displays the filename(s) of the electronically associated document(s) as a selectable hyperlink. Non-Electronic attachments will not have an associated hyperlink.
Security Level	This displays the chosen security level of the document.
Submit	When the Submit button is selected, the Interconnection Modification will be filed.
Continue	This button will take the user to the attachment screen where attachments will be made for the first time.
Attach	This button will take the user back to the attachment screen to make additional attachments.
Exit	This button will take the user back to the main menu screen without saving any information.

4 Tariff Submission

A tariff is a schedule of rates, terms and conditions that a company files. The Tariff Submission menu screen shows the various options available when working with tariffs.

Tariff Menu Screen
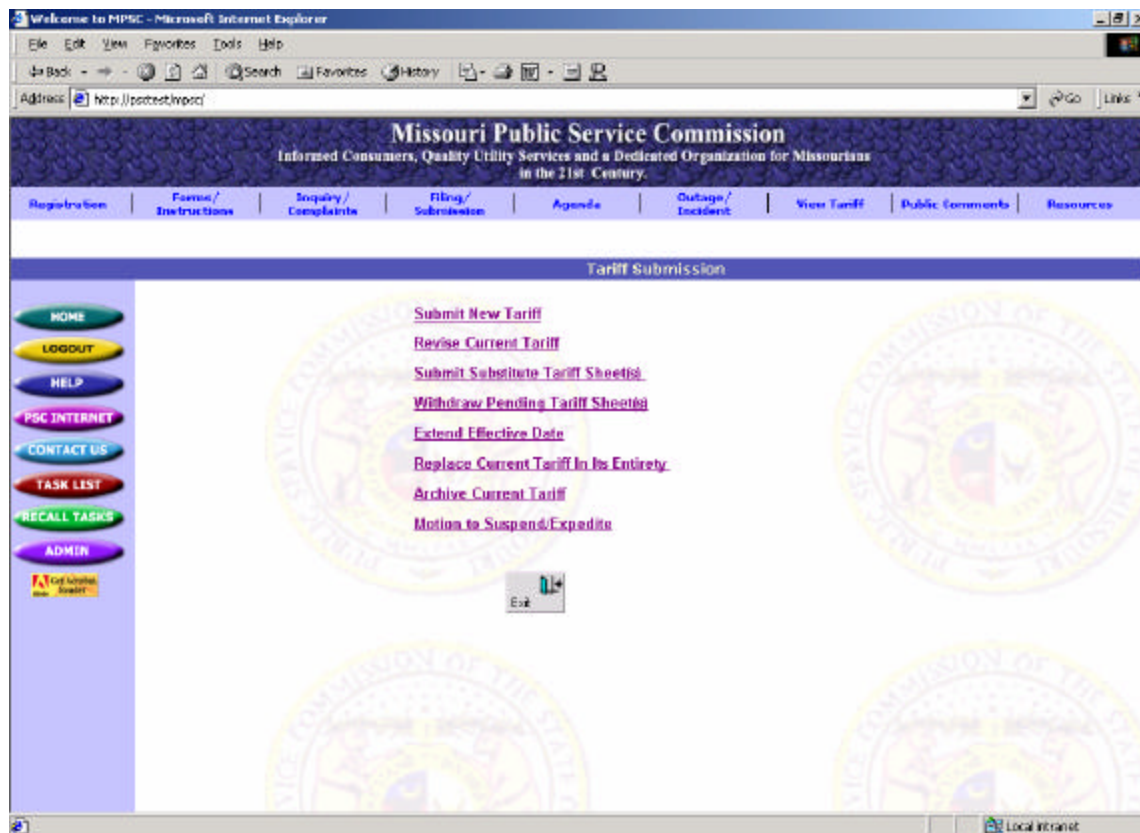
4.1   Submit New Tariff

This process is used by the utility companies to file a new tariff; and by the Record Room staff to submit new tariff received from the utility companies through mail/fax.

A new tariff submitted is treated as a 'Pending Tariff', which needs approval from the commissioners. A tariff becomes 'Official' after it has been approved.

<u>Submit New Tariff</u>

Press the Submit button to add information to the system.

Press the Attach button to attach documents.

Press the Exit button to go to the main menu.

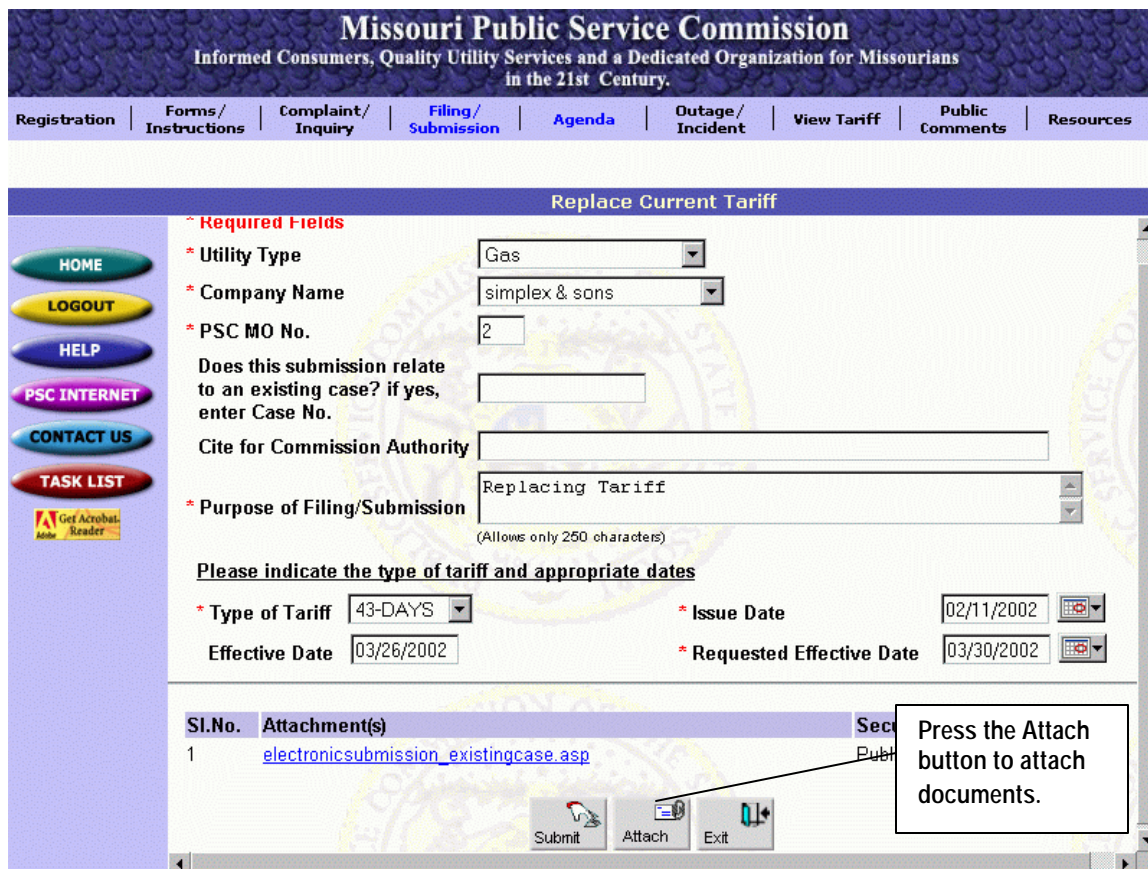| Field / Button	Description
* Required Fields	Denotes that the field is mandatory.
Scanned documents	Applicable only to internal users. The link is invisible once the attachments are made.
Utility Type	Mandatory. Allows the user to select a utility from the available options.
PSC MO No.	Mandatory. Accepts the PSC MO number.
Company Name	Mandatory. Allows the user to select a company from the available options.
Does this submission relate to an existing case? If yes, enter the Case No.	Accepts a valid case number related to the tariff being submitted. When entering an invalid case number, the message "Case Number does not exist" will appear.
Cite for Commission Authority	Allows the user to enter the Cite for Commission Authority.
Purpose of Filing / Submission	Mandatory. Allows the user to enter the purpose of the Filing / Submission.
Type of Tariff	Mandatory. Allows the user to select the type of tariff.
Issue Date	Mandatory. Allows the user to select the issue date
Effective Date	Displays the effective date for the type of tariff and issue date selected.
Requested Effective Date.	Accepts the valid requested effective date.
Attachments	If the form has any attached files, the file names will be displayed as links.
Security Level	Displays the security level of the attached documents.
Continue	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also
Attach	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also.
Submit	When this button is selected, various error messages will appear if mandatory fields are not completed. If all of the conditions are satisfied then the message, "Press OK to Submit or Cancel to review all data entered before final Submission." will be displayed. When the OK button is selected, information will be inserted into the system.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.

4.2   Revise Current Tariff

External utility companies can revise previously filed 'Approved' tariff sheet with new ones using this option. Internal record room staff can also to revise previously filed approved tariff sheet received through mail/fax from utility companies.

<u>Revise Current Tariff Screen</u>

Press the Submit button to add information to the system.

Press the Attach button to attach documents.

Press the Exit button to go to the Main menu.

Field/Button	Description
* Required Fields	Denotes that the field is mandatory.
Scanned documents	Applicable only to internal users. The link is invisible once the attachments are made.
Utility Type	Mandatory. Allows the user to select a utility type from the list provided.
Company Name	Mandatory. Allows the user to select a company from the options available.
PSC Mo No.	Mandatory. Accepts the PSC MO number entered. The entered tariff details are checked for validity i.e. the tariff is of an approved type. If tariff is not approved, the message "No Approved Tariff found" will appear.
Does this submission relate to an existing case? If yes, enter Case No.	Accepts the case number entered. If the case number entered is not valid, the message "Case No. does not exist." will appear.
Cite for Commission Authority	Accepts the Cite for Commission Authority.
Purpose of Filing/Submission	Mandatory. Accepts the purpose of the filing / submission.
Details of Revision	Mandatory. Accepts the details of the revision.
Attachments	If the form has any attached files, the file names will be displayed as links.
Security Level	Displays the security level of the attached documents.
Continue	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also.
Attach	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also.
Submit	When this button is selected various error messages will appear if mandatory fields are not completed. If above all conditions are satisfied then the message, "Press OK to Submit or Cancel to review all data entered before final Submission." will be displayed. When the OK button is selected, information will be inserted into the system.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.

4.3   Submit Substitute Tariff Sheet(s)
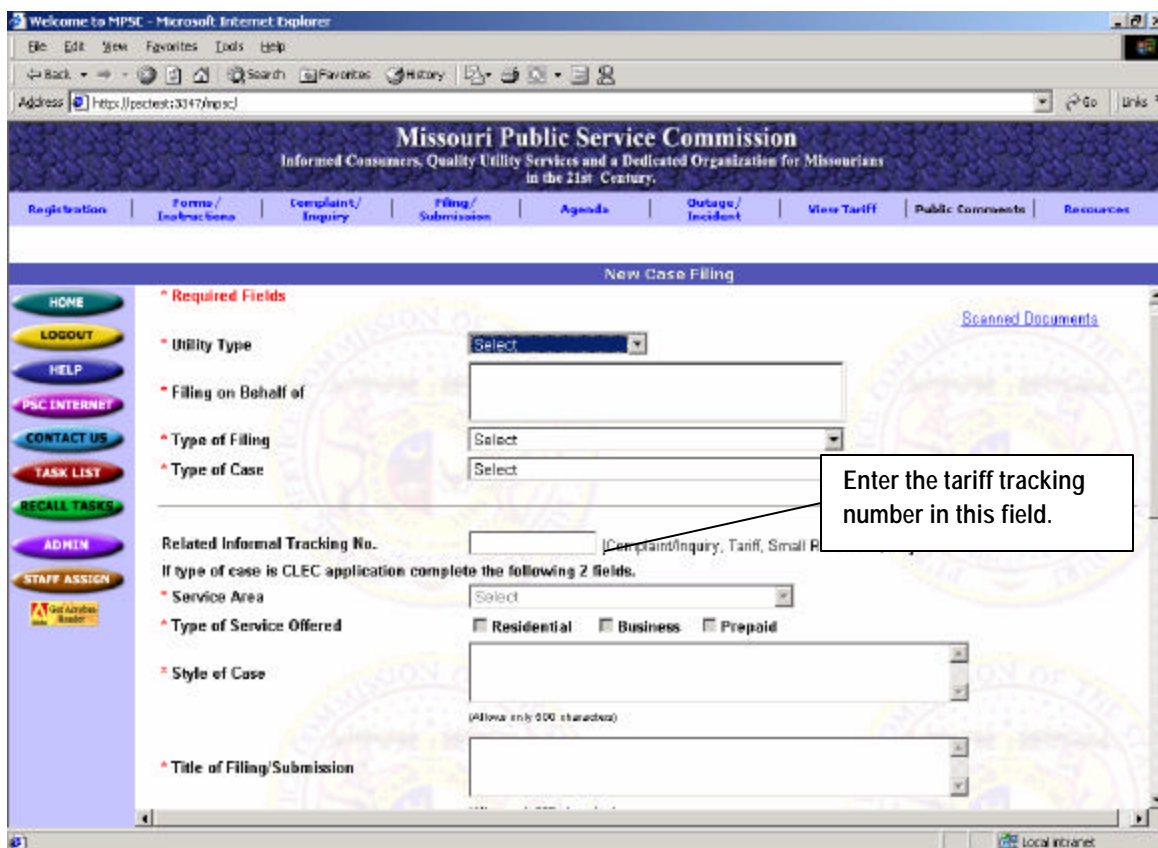
The Submit Substitute Tariff screen is used by the utility companies to substitute previously filed Tariff documents (pending ones) with new ones.

Submit Substitute Tariff Screen

Field/Button	Description
* Required Fields	Denotes that the field is Mandatory.
Scanned Documents	Applicable only to internal users. The link is invisible once the attachments are made.
Tracking No.	The user can enter the Tracking number for the Tariff document to be substituted. If the entered tracking number is not filed the message "Tracking Number does not Exist" will be displayed. If the entered tracking number does not have a previously filed tariff then the message "Only tariffs with pending document status can be withdrawn" will be displayed. If the documents are approved then the utility type company number and PSC MO number related to that document will be displayed.
Clear and Concise Statement for Substitute	This field allows the user to enter the clear and concise statement for the tariff to substitute.
Details of Tariff sheets to be Substitute	This field allows the user to enter the details for the tariff to substitute.
Attachments	If the form has any attached files, the file names will be displayed over here as links.
Security Level	Displays the security level of the attached documents.
Continue	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also.
Attach	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also.
Submit	When this button is selected various error messages will appear if mandatory fields are not completed. If above all conditions are satisfied then the message, "Press OK to Submit or Cancel to review all data entered before final Submission." will be displayed. When the OK button is selected, information will be inserted into the system.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.

4.4   Withdraw Pending Tariff Sheet(s)

The Withdraw Pending Tariff screen is used by the Utility companies to withdraw previously filed Tariff documents (pending ones). No approved tariff document can be withdrawn.

Withdraw Pending Tariff Screen

Field / Button	Description
* Required Fields	Denotes that the field is mandatory.
Scanned Documents	Applicable only to internal users. The link is invisible once the attachments are made.
Tracking No	Mandatory. Allows the user to enter the tracking number for the tariff document to be withdrawn. If the entered tracking number does not exist in the database, the message "Tracking Number does not Exist" will appear. If the entered tracking number does not have previously filed tariff then the message "Only tariff with pending document status can be withdrawn" will appear. If the documents are approved then the utility type company number and PSC MO number related to that document will be displayed.
Clear and Concise Statement for Withdraw	Mandatory. Allows the user to enter the clear and concise statement for the tariff to be withdrawn.
Details of Tariff sheets to be withdrawn	Mandatory. Allows the user to enter the details for the tariff to be withdrawn.
Attachments	If the form has any attached files, the file names will be displayed over here as links
Security Level	Displays the security level of the attached documents.
Attach	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also.
Submit	When this button is selected various error messages will appear if mandatory fields are not completed. If above all conditions are satisfied then the message, "Press OK to Submit or Cancel to review all data entered before final Submission." will be displayed. When the OK button is selected, information will be inserted into the system.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.

4.5 Extend Effective Date

External utility companies can extend the effective date for previously filed 'Pending' tariff sheets. The effective date can be extended only for pending tariff sheets.

Tariff Extend Effective Date Screen

Press the Submit button to add the information to the system.

Press the Attach button to attach documents.

Press the Exit button to go to the Main Menu screen.

Field / Button	Description
* Required Fields	Denotes that the field is mandatory.
Scanned Documents	Applicable only to internal users. The link is invisible once the attachments are made.
Tracking No.	Accepts the tracking number. If the user does not enter The tracking number then the message "Please enter Tracking No" will be displayed. If the entered tracking number is not existing then the message "Tracking Number: Does not Exist" will be displayed.
Utility Type	Displays the Utility Type for the tracking number entered.
Company Name	Displays the company name for the tracking number entered.
PSC MO No.	Displays the PSC MO number of the particular tracking number.
Proposed Effective Date	Displays the proposed effective date of the particular tracking number.
Requested Effective Date	Accepts the requested effective date either manually or by using calendar control. If the requested effective date is not valid the message "Please enter date in mm/dd/yyyy format" will be displayed.
Revised Proposed Effective Date	Accepts the Revised Proposed Effective Date either by manually or by calendar control. If Revised effective date is not valid the message "Please enter date in mm/dd/yyyy format " is displayed.
Clear and Concise Statement for Extension	Enter the clear and concise statement for extension.
Attachments	If the form has any attached files, the file names will be displayed over here as links.
Security Level	Displays the security level of the attached documents.
Attach	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.
Submit	When this button is selected various error messages will appear if mandatory fields are not completed. If above all conditions are satisfied then the message, "Press OK to Submit or Cancel to review all data entered before final Submission." will be displayed. When the OK button is selected, information will be inserted into the system.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.

4.6 Replace Current Tariff in its Entirety

Tariffs are the documents that are submitted by the external utility company. Externally by the utility companies to replace entire tariff or internally by the record room staff can replace the tariff.

A Tariff received for replacement is treated as 'Pending tariff' and it becomes official when it is approved.

Replace Current Tariff in its Entirety Screen

Field / Button	Description
* Required Fields	Denotes that the field is mandatory.
Scanned Documents	Applicable only to internal users. The link is invisible once the attachments are made.
Utility Type	Mandatory. Allows the user to select a utility type from the list provided.
Company Name	Mandatory. Allows the user to select a company name from the options available.
PSC Mo No.	Mandatory. Accepts the PSC MO Number and checks if the detail of the tariff entered is of an Approved type. If the tariff is not approved, the message "No Approved Tariff found" will be displayed.
Does this submission Relate to an existing Case? if yes, enter Case No.	Accepts the case number if it is an existing case. When the user moves the cursor away from this field, the system validates the case number. If the case number is not valid, the message "Case No does not exists" will appear.
Cite for Commission Authority	Accepts the Cite for Commission Authority.
Purpose of Filing / Submission	Mandatory. Accepts the Purpose of the Filing / Submission.
Type of Tariff	Allows user to select type of tariff from the list provided.
Issue Date	Accepts the issue date. If the issue date is invalid, the alert message "Please enter date in mm/dd/yyyy format " will appear.
Effective Date	Displays the effective date.
Requested Effective Date	Accepts the requested effective date. If the requested effective date is invalid, the alert message "Please enter date in mm/dd/yyyy format " will be displayed.
Security Level	Displays the security level of the attached documents.
Attachments	If the form has any attached files, the files names will be displayed here as links.
Continue	This button opens the Attachment screen. Validations mentioned with the Submit button are applicable here also.
Attach	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff

Field / Button	Description
	Menu screen.
Submit	When this button is selected various error messages will appear if mandatory fields are not completed. If above all conditions are satisfied then the message, "Press OK to Submit or Cancel to review all data entered before final Submission." will be displayed. When the OK button is selected, information will be inserted into the system.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.

4.7   Archive Current Tariff

This option is used by the utility company representative to file for an archive of the non-pending tariff documents uses archive Tariff Screen.

Archive Current Tariff Screen

Field / Button	Description
* Required Fields	Denotes that the field is mandatory.
Scanned Documents	Applicable only to internal users. The link is invisible once the attachments are made.
Utility Type	Allows the user to select a utility type from the list provided.
PSC MO No.	Accepts the PSC MO number from the user.
Company Name	Allows user to select a company from the list provided. Once selected, the validation is pending for the tariff document for the user selected criteria (utility type + PSC MO No. + company name). If found invalid, the message "No record exists" will appear. If there is a pending tariff document, the Submit and Attach buttons will be enabled.
Purpose of Archive	Allows the user to enter the purpose for archiving the current tariff document.
Attachments	If the form has any attached files, the file names will be displayed over here as links
Security Level	Displays the security level of the attached documents.
Attach	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.
Submit	When this button is selected various error messages will appear if mandatory fields are not completed. If above all conditions are satisfied then the message, "Press OK to Submit or Cancel to review all data entered before final Submission." will be displayed. When the OK button is selected, information will be inserted into the system.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. When the OK button is chosen, the user will be taken back to the Tariff Menu screen.

4.8 Motion to Suspend / Expedite

If a company files a tariff and the PSC staff finds it to be unacceptable, they will request that the attorney file a motion to suspend the tariff. When selecting this option, the user will be taken to the New Case Filing Screen where they can complete the filing. Filings are accepted through web, fax or mail. If the user is filing through web, the user will logon into the system and will complete the related page. The soft copy of the relevant documents will be sent as an attachment. The PSC staff can also enter a case, on behalf of an individual or company, which is received through mail or fax and the documents will be scanned and entered into the system. The PSC staff themselves can file a case.

Motion to Suspend / Expedite – New Case Filing Screen

5 Agenda

This process, as the name suggests, is used to prepare the agenda for the Commissioners meeting. This module allows the user to view the agenda details, agenda minute details and also can update the agenda minutes by MPSC staff for a selected date. Upon selecting "Agenda" in the menu bar (on the top of the web page), the following screen is displayed. The links on this page are used to access the different Agenda forms in the application.

<u>Agenda Information Menu Screen</u>

5.1   View Agenda

The Search screen is used to display the agenda details for the entered year and month. The agenda dates are populated for the entered year and selected month. Upon selecting an agenda date, details are displayed for the specified agenda date. The Result screen displays all the details of an agenda for a selected date.

View Agenda Search Screen

Takes the user to Agenda Information Menu screen.

Enter the year, select the month and then select the Agenda date.

These are section headings and each section contains data pertaining to the heading.

This button allows the user to print the document.

Fields/Button	Description
Year	The user can enter a year in yyyy format.
Month	This is a drop down box from which a specific month can be selected.
Agenda Date	It displays the agenda date for the entered year and selected month.
Item No.	This field displays the item number
Case/Tracking No.	This field displays the case/tracking number pertaining to tariff/new orders.
Company Name/Brief Description	This field displays the company name and the description pertaining to the Case/Tracking number.
Name Of Staff Entering/Contact	This field displays the lead staff name and then the rest of the staff names.
Other Discussion	This field displays other discussions, which are not covered under Case or Tracking details.
Description	This field displays the description of the discussions.
Vote To Close	This field displays the Vote To Close Description.
Name Of Staff Entering Item	This field displays the lead staff name and then the rest of the staff names.
Print	Prints the current page.
Exit	Returns the user to the main menu.

5.2   View Minutes

The Search screen is used to display the Minutes details for the selected date. The minutes dates are populated for the entered year and selected month. On the selection of a minutes date details are displayed for the selected date. The Result screen displays all the details of an agenda minutes for a selected date.

View Minutes Search Screen

Enter the year, select the month and then select the Agenda date.

These fields display the time set for the agenda and the agenda location.

These are section headings and each section contains data pertaining to the heading.

This button takes the user to the Agenda Information menu.

Prints the current page.
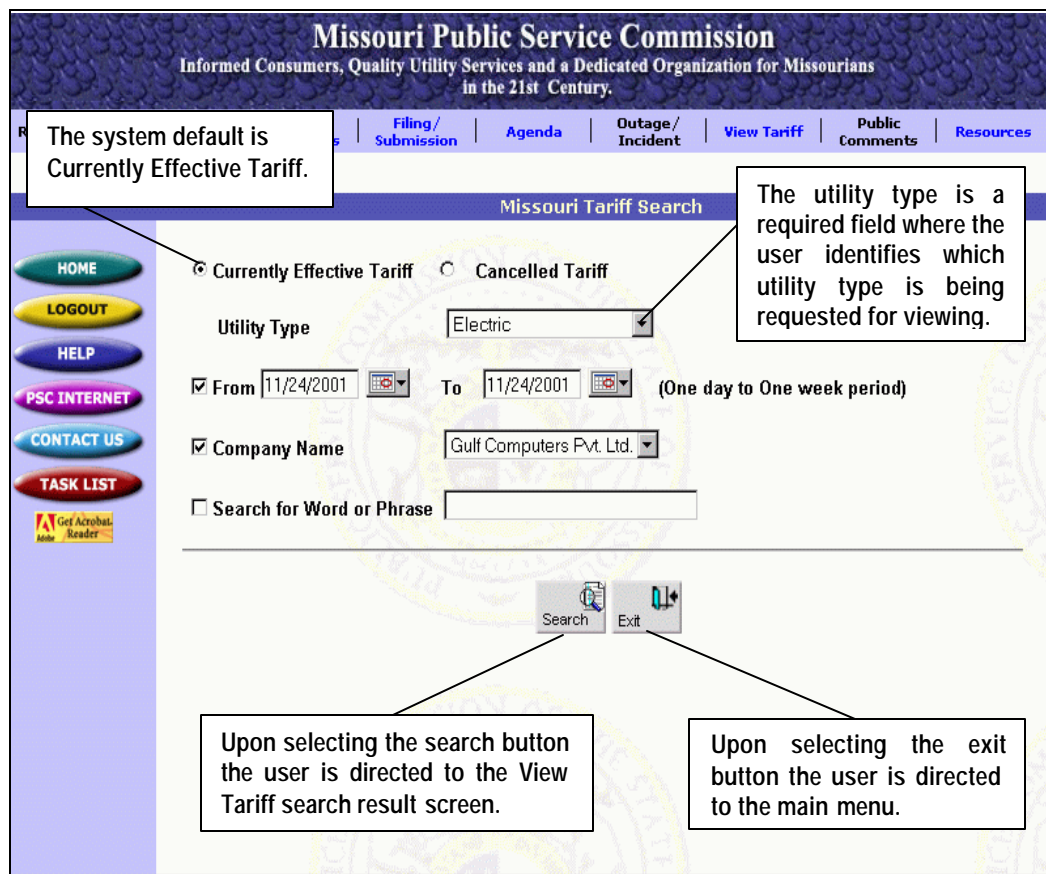
Fields / Button	Description
Year	The user can enter a year. The year validation is done as per validations.
Month	This drop down list displays the twelve months of a year.
Agenda Date	This drop down list displays the Agenda Date for the entered year and selected month.
AS, JJ, KS, SF, SS	This field displays the current Commissioner ID's.
Staff	This field displays the attendance of the staff.
Approval of Minutes of Last Agenda Meeting	Heading for the display of the initials of those who have approved the meeting minutes.
Date of Agenda	This field displays the agenda date and action taken by the commissioner's.
Case/Tracking No.	This field displays the Case/Tracking Number. Selecting the Case / Tracking Number shows the list of documents related to the case.
Continued (Date if applicable)	This field displays the date if the agenda needs to be discussed further.
Dissent	This field displays the reason of disapproval of the commissioners.
Concur	This field displays the reason of approval of the commissioners.
Case No.	This field displays the case number. Selecting Case number shows the list of documents related to the case.
Company Name / Brief Description	This field displays the name of the company and agenda description.
Brief Description	This field displays agenda description.
Staff Entering / Contact	This field displays the name of the staff.
Action	This field displays action taken on agenda.
Vote To Close – Other Discussion	This field displays the description for the closure of other discussion.
Print	Prints the current page.
Exit	Goes to main menu.

6 View Tariff
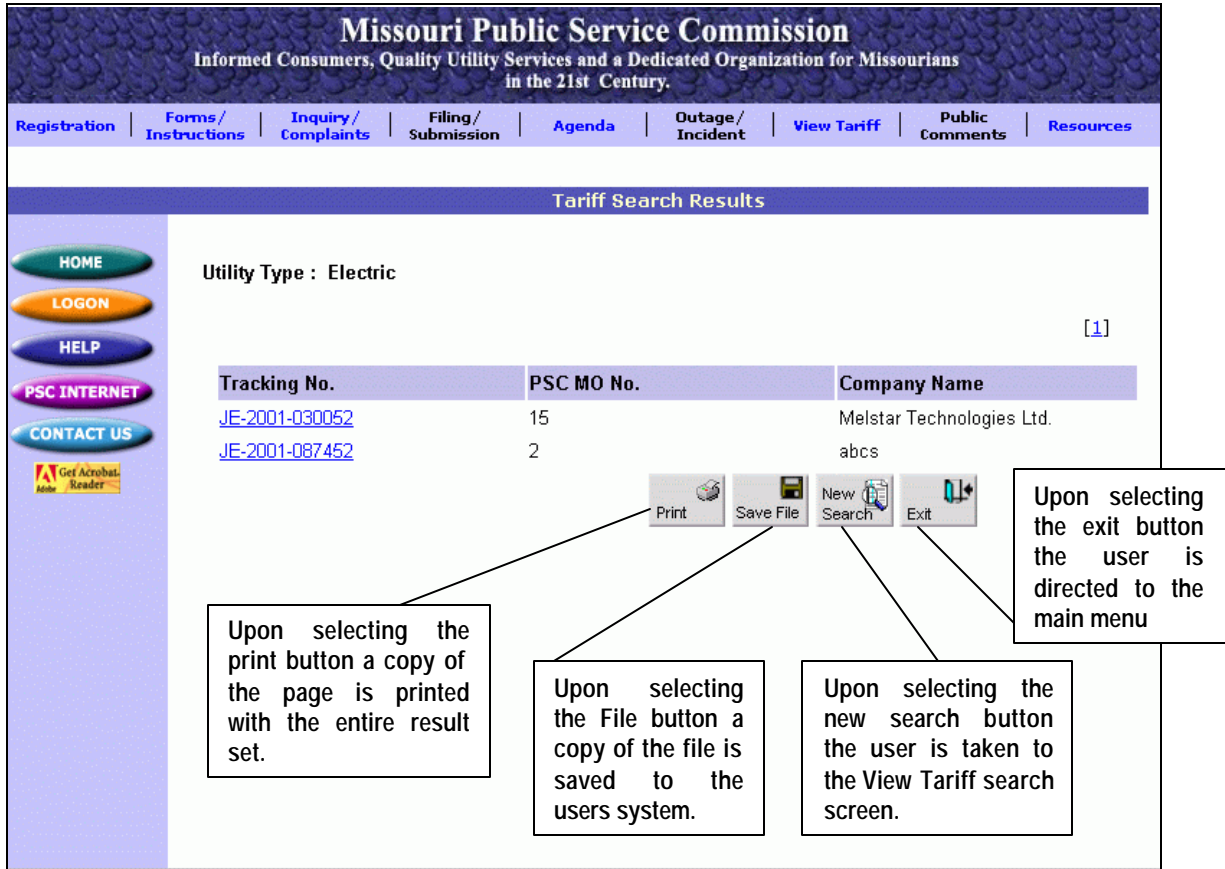
The process is to view the list of tariff filed by the companies of a specific utility type in a specific period based on which are either currently effective tariff or cancelled tariff. A period should be limited from one day to one week. The report can be based on user specified company name.

View Tariff Search Screen

Field/Button	Description
From / To	This field is optional. This date field assists the user in identifying a time frame in which to perform their search. The date can be entered manually or selected from the calendar picture to the right of each field.
Company Name	This optional field allows the user to search based on company name. If the user has selected the Company Name check-box, then the company name will need to be selected from the drop down box.

View Tariff Result Screen

Field/Button	Description
Tracking Number	If the user is clicks on the tracking number they will be directed to the Tariff Sheet Screen
Print	Upon selecting the print button a copy of the page is printed with the entire result set.
Save File	If the user clicks the save File button a copy of the file is saved in the users system.
New Search	The user id directed to the View Tariff screen.
Exit	The user is directed to the previous menu.

7   Inquiry / Complaints
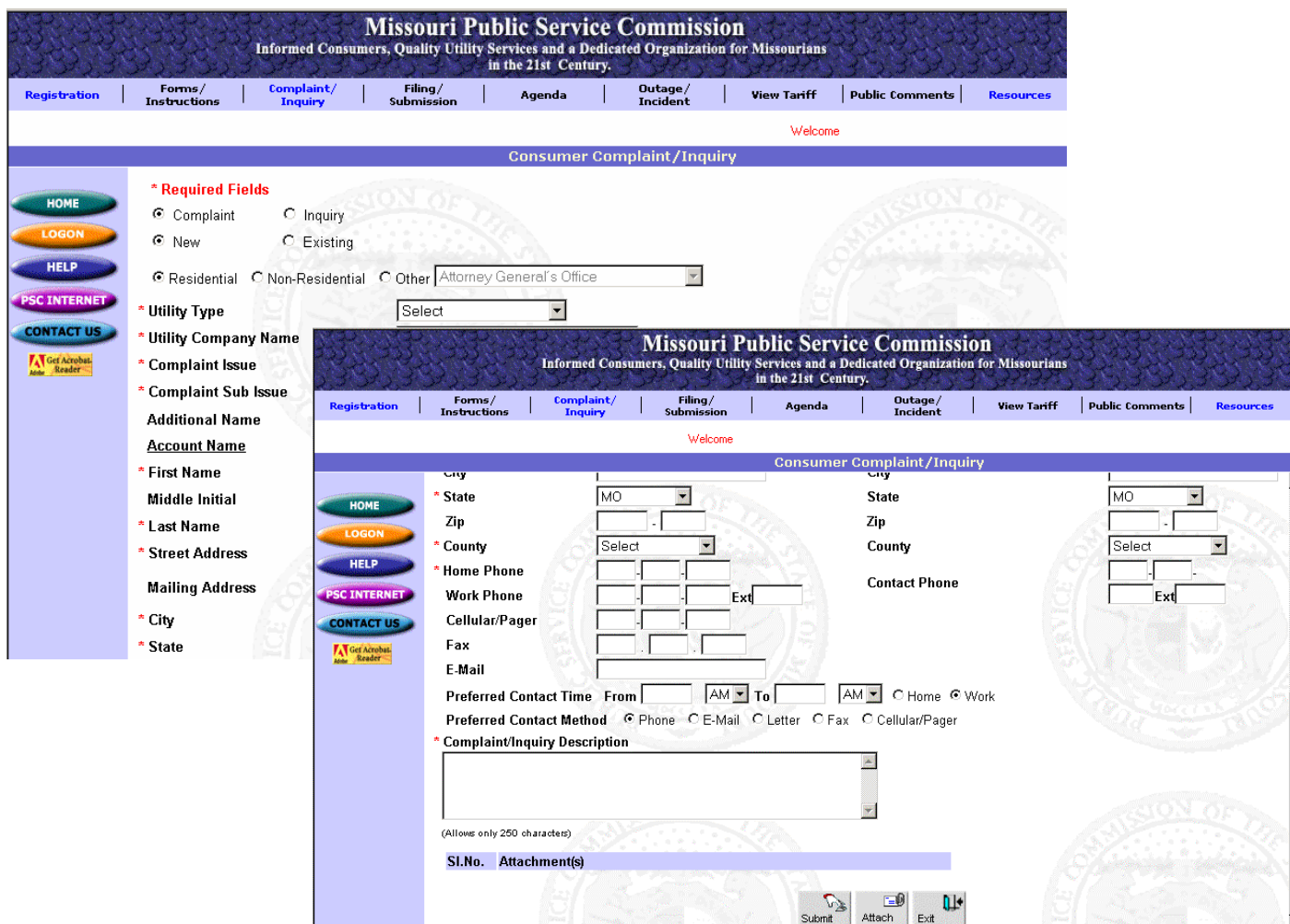
This section allows external consumers to make inquiries or complaints. The external consumer has the option to make a complaint or an inquiry, check the status of a complaint or an inquiry, or to reply to the Public Service Commission in regards to an inquiry or a request for more information.

Complaint / Inquiry Menu Screens

7.1   Complaint / Inquiry

Complaints / inquiries related to utility companies such as billing problems, rates, etc., can be filed using this option. An inquiry can be turned into a complaint and can be registered with the Public Service Commission. Both registered utility companies and individuals can submit complaints or inquiries. Scanned documents can be added to the form by selecting the Scanned Document link and attachments can be added by selecting the Attach button at the bottom of the page.

> ❖ This form will be called up directly. The complaint will be submitted only if all of the mandatory fields are entered.
> ❖ The user can support the complaint with an electronic attachment.
> ❖ The complaint will always be handled by the Consumer Service Department.

Fields	Description
*Required Fields	Denotes that the field is mandatory.
Inquiry / Complaint	This field accepts the type of report being files- whether an inquiry or complaint
New or existing or Reopen	This field accepts the status of the report being filed, whether a new report is being filed, or an existing one is being modified, or re-opening a closed report.
Mode of Receipt	This field allows the user to select the mode by which the complaint/ inquiry was filed.
Residential or Non-Residential or Other	This field accepts the status of the user logging the report, whether Residential or Non-Residential or Other. If the Non-Residential option is selected then an official user can enter information for "Additional Name". If "Other" is selected, then the user should select the other description from the Listbox.
Utility Type	This field allows the user to select a utility type from the list provided.
Utility Company Name	This field allows the user to select a company name from the list provided dependent upon the utility type selected.
Priority	This field accepts the user-determined priority of the complaint / inquiry from the drop-down list.
Complaint Issue	This field allows the user to select a complaint issue from the list provided
Complaint Sub Issue	This field allows the user to select a complaint sub issue from the list provided.
Consumer's Account No.	This field allows the user to enter the Consumer's account number. The user is not allowed to enter an account number that is more than 20 characters/numbers in length.
Additional Name	This field allows the user to enter an additional name for the business purpose. This text box is enabled only if the "Non-Residential" option is selected.
Account Name or Reporting Party	This field accepts details for the user who is logging the Inquiry / Complaint
First Name	This field accepts the first name
Middle Initial	This field accepts the middle initial of the name
Last Name	This field accepts the last name
Street Address	This field accepts the street address.

Fields	Description
Mailing Address	This field accepts the mailing address.
City	This field accepts the city name
State	This field allows selection of the state from the list provided.
Zip	This field accepts the Zoning Improvement Plan code. The zip code should be either 5 or 9 digits long.
County	This field accepts the county name
Consumer Phone	This field accepts the phone no. The phone number should be entered in ###-###-#### Ext.##### format.
Fax	This field accepts the Fax number. The fax number should be entered in ###-###-#### format.
E-Mail	This field accepts the E-mail of the reporting party.
Preferred Contact Time	This field accepts the time in HH:MM format using a 12 hour clock.
Home or Work	This field accepts the preferred contact location.
Preferred Contact Method	This field accepts the preferred contact method like phone or e-mail or letter or fax.
Complaint / Inquiry Description	This field accepts the Complaint / Inquiry description about the complaint being entered by the user.
Attachments	If a user has attached any files to the form, the file names will be displayed here as links.
Submit	This button is used to file the entered information with the Public Service Commission. When this button is chosen, various informational / error messages will appear if any of the fields are left blank. If all of the above conditions are satisfied, the message "Press OK to Submit or Cancel to review:" is displayed. When the OK button is selected, the "Do you have another complaint to submit? If yes, then OK else cancel" message is shown. Clicking OK will cause the complaint or inquiry to be filed with the MPSC.
Attach	This button opens the Attachment screen where the user will attach electronic documents to the submission. Non-electronic documents can be identified as forth-coming to the Public Service Commission. Electronic documents will be attached to the submission by using the browse button, selecting the file, and then choosing this Attach button.
Resolve	This button opens the Complaint / Inquiry Resolve Notification Screen. Validations mentioned for the Submit button are applicable here also.
Exit	This takes the user back to the Inquiry / complaint menu screen.

7.2   Status Check

This option enables the user to check the status of a previously filed compliant or inquiry. If the user does not know the Complaint / Inquiry number, they should contact the Public Service Commission.

Status Check Screens

The status of the complaint can be checked by entering the complaint number on this form and pressing the Tab key.

7.3   Reply to Public Service Commission

This form is used when additional information or documentation has to be supplied to the Public
Service Commission by external users (individual or utility company).

Consumer Complaint / Inquiry – Reply to Public Service Commission Screen

The user can submit the reply only if a request has been made pertaining to the Complaint
Number that the user has entered. The expected response date dropdown box is populated with
the response date, which the user has to select (mandatory) and then submit the response.

Fields	Description
*Required Fields	Denotes that the field is mandatory
Expected Response Date	This field accepts the expected response date from the user on the selected Complaint / Inquiry Number from the drop-down box.
Reply To	This field displays the name of the Public Service Commission staff member to whom the reply is being made.
Utility Type	This field displays the utility type.
Utility Company	This field displays the utility company.
Utility Account Number	This field displays the utility account number.
Complaint / Inquiry Description	This field displays the complaint / inquiry description.
Utility/Consumer Response	This field displays the utility/consumer's response to the complaint / inquiry.
Reporting Party-Business Name	This field displays the business name of the reporting party.
Contact Name	This field displays the contact name of the contact party.
Address	This field displays the address of the reporting party.
City	This field displays the city of the reporting party.
State	This field displays the state of the reporting party.
Zip	This field displays the Zoning Improvement Plan code of the reporting party.
Consumer Phone	This field displays the phone number of the reporting party.
Contact Phone	This field displays the phone number of the number of the contact party.
Email	This field displays the email of the reporting party.
Preferred Contact Time	This field displays the preferred contact time of the reporting party.
Attachments	If the form has any attached files, the filenames will be displayed here as links.
Submit	This button will file the complaint / inquiry reply with the Public Service Commission.
Attach	This button opens the Attachment screen where the user will attach electronic documents to the submission. Non-electronic documents can be identified as forth-coming to the Public Service Commission. Electronic documents will be attached to the submission by using the browse button, selecting the file, and then choosing this Attach button.
Exit	When this button is selected, the message "Do you want to exit without submitting?" will appear. If OK is selected, the user will be taken back to the Complaint / Inquiry menu.

8 Outage / Incident Notification

The Outage / Incident screens are submitted for water contamination, gas leaks, floods, major electrical failures, and similar events. Only utility companies and internal staff members (based on User ID) have access to these screens. These forms receive the highest priority over all other tasks in the workflow. The user should select Outage / Incident from the main menu bar. Then select Outage / Incident Report from the next screen.

Main Menu Screens
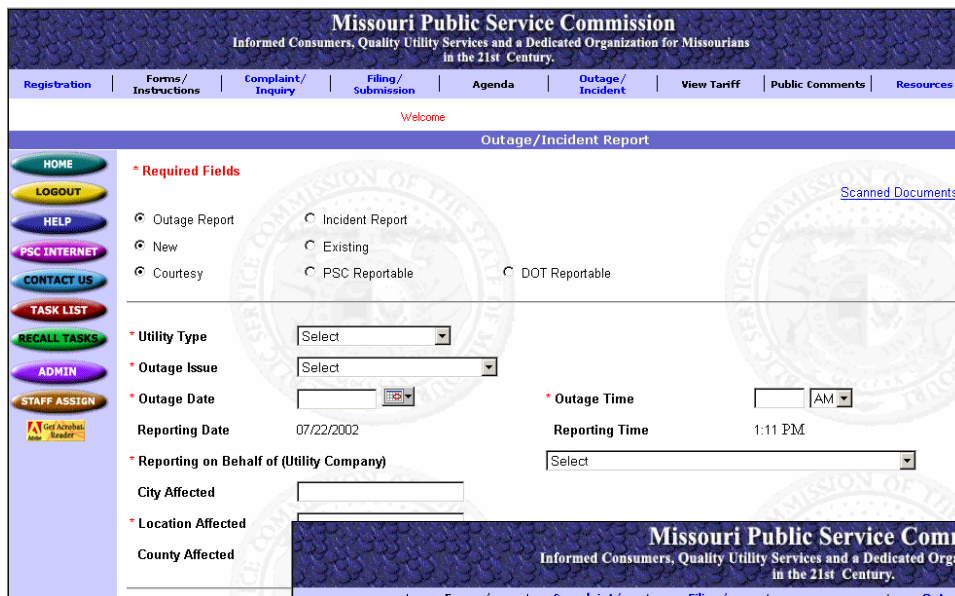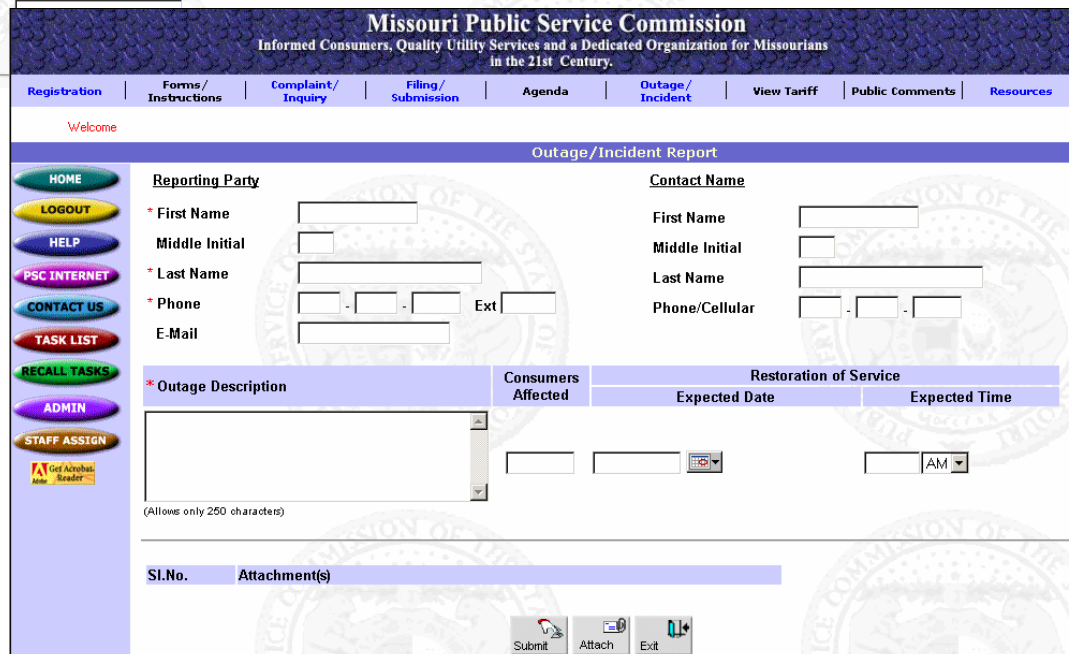
Select this option to file an Outage / Incident Report.

8.1   Outage / Incident Report

The Outage/Incident screen is completed by the utility companies, or the affected parties.

Outage / Incident Report Screens
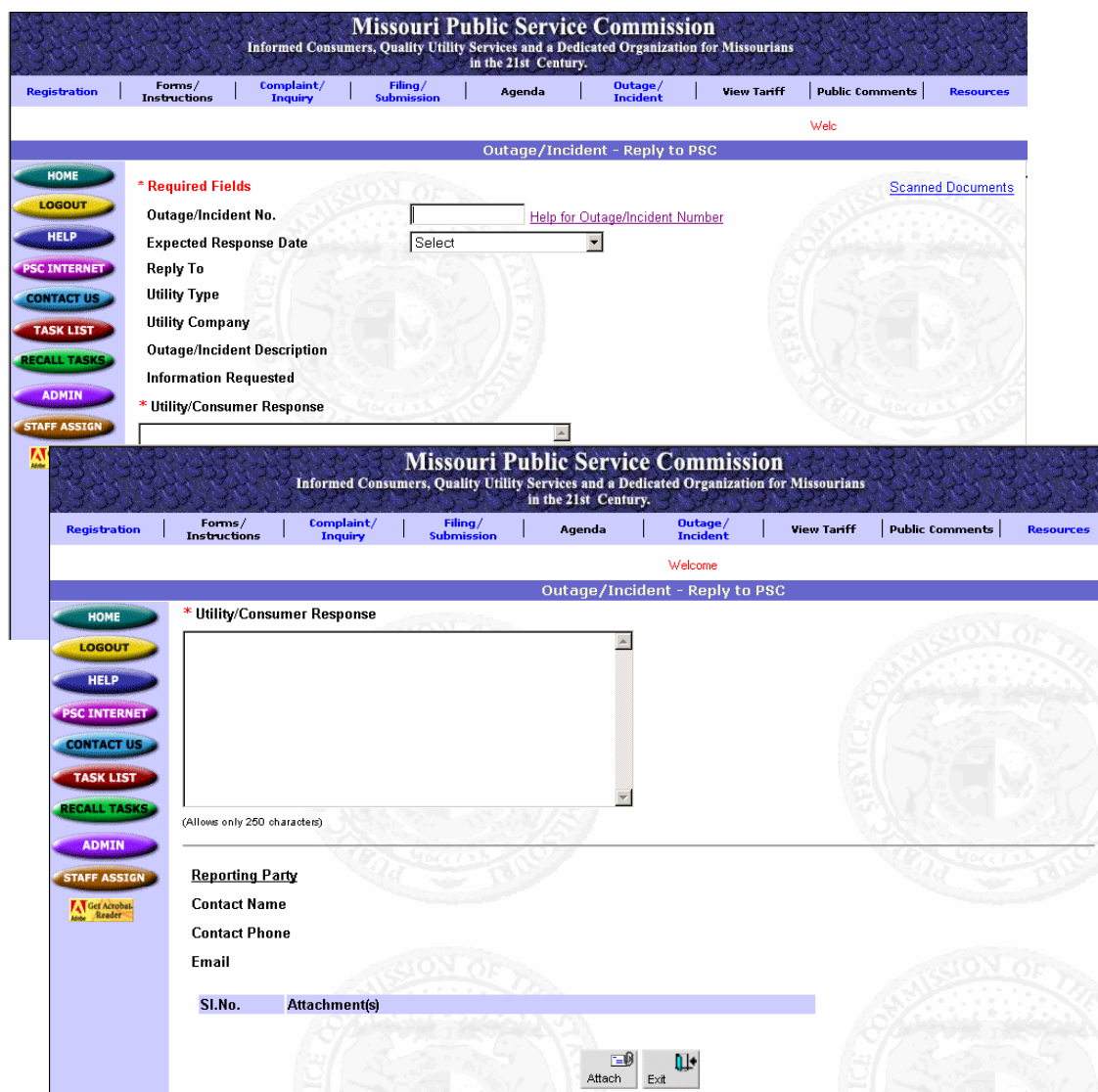
- ❖ Various alert messages will appear if mandatory fields are left empty
- ❖ The outage date and time should always be less tan the outage reporting date and time
- ❖ The reporting data and time will be the current date and time.

Fields	Description
Outage Report Incident Report	These radio buttons indicate the type of report being filed – whether an outage or incident
New or Existing	These radio buttons indicate the status of the report being filed, whether a new report is being filed or an existing one is being modified.
Utility Type	This field allows the user to select a utility typed from the list provided.
Outage Issue	This field allows the user to select an outage issue from the list provided.
Outage Date	This field the outage date.
Outage Time	This field allows the user to enter the outage time.
Utility Company	This field allows the user to select a utility company from the list provided.
City affected	This field accepts the city.
Location Affected	This field accepts the location
County Affected	This field allows the user to select a county from the list provided
Reporting Party – First Name	This field accepts the first name of the reporting party.
Reporting Part – Middle Initial	This field accepts the middle initial of the reporting party
Reporting Party – Last Name	This field accepts the last name of the reporting party
Reporting Party – Phone	This field accepts the phone number of the reporting party
Reporting Party – Email	This field accepts the email of the reporting party.
Contact Name – First Name	This field accepts the first name of the contact person
Contact Name – Middle Initial	This field accepts the middle initial of the contact person
Contact Name - Last Name	This field accepts the last name of the contact person.
Contact Name – Phone / Cellular	This field accepts the phone number of the contact person.
Outage Description	This field accepts an outage description from the user.
Consumer's Affected	This field accepts the number of consumers affected.
Restoration of Service – Restoration Date	This field accepts the restored date of the outage / incidence report being filed.
Restoration of Service – Restoration Time	This field accepts the restored time of the outage / incidence report being filed.
Submit	This button is used to submit the outage / incidence report to the Public Service Commission.
Attach	This button opens the Attachment screen where the user will attach electronic documents to the submission. Non-electronic documents can be identified as forth-coming to the Public Service Commission. Electronic documents will be attached to the submission by using the browse button, selecting the file, and then choosing this Attach button.
Exit	When this button is selected, the message "Do you want to exit without submitting?" is displayed. Selecting OK will take the user back to the Outage / Incidence Notification menu.

8.2   Reply to the Public Service Commission

This form is used when additional information or documentation has to be supplied to the Public Service Commission by external users (individual or utility company).

Consumer Complaint / Inquiry – Reply to Public Service Commission Screen

The user can submit the reply only if a request has been made pertaining to the Complaint Number that the user has entered. The expected response date dropdown box is populated with the response date, which the user has to manually select and then submit the responses.

Fields	Description
Outage / Incidence No.	This field accepts the Outage / Incidence number. If a valid Outage / Incidence number is entered, the following details are displayed to the user: ❖ The expected response date list is populated ❖ The name of the Public Service Commission staff to whom the response is being sent. ❖ Utility type ❖ Utility company ❖ Outage / Incidence description ❖ Information requested And the details of the reporting party filing that outage / incidence report.
Expected Response Date	The user has to select the response date from the available list.
Utility / Consumer Response	This field allows the user to enter the response
Submit	This field is used to submit the Reply to the Public Service Commission.
Attach	Enables the user to attach supporting documentation sing the attachment screen.
Exit	When this button is selected, the message "Do you want to exit without submitting?" is displayed. If OK is selected, the user will be taken back to the Outage Incidence Notification menu.

9 Resources

The main menu screen for the Resources module is found at the far right of the Home screen of the system.

Resources Main Menu Screen

9.1 Case Information

This module gives reports on any information regarding a case filed to MPSC.
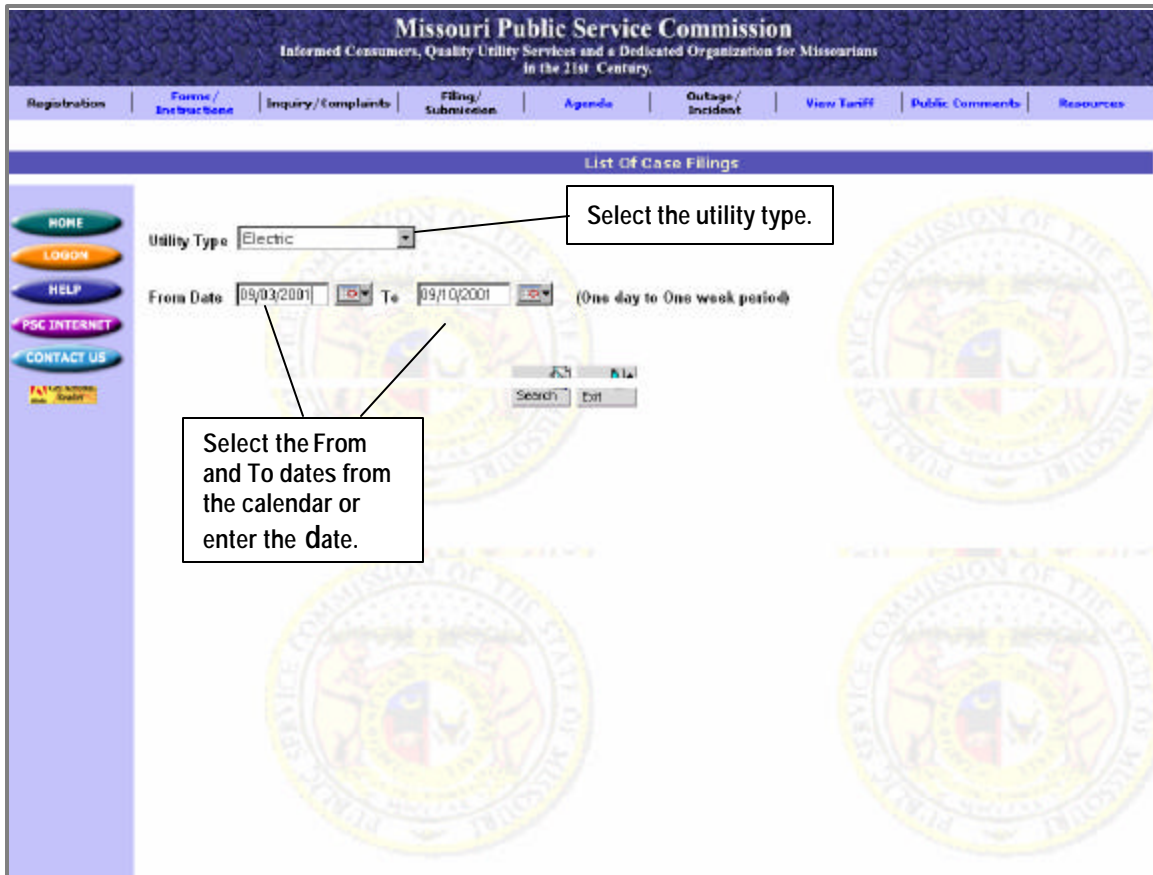
Case Information Menu Screen

9.1.1   Recent Case Filings

This option is to view all the list of filings of the case.

Recent Case Filings

Recent Case Filings Result Screen

9.1.2   Case Filing / Submission

This Case filing submission screen is used to accept the dates, checkbox values to display a detailed report of entire case filings details. The accepted From and To dates are limited to twelve months. The dates can be entered manually or through the calendar button. In Simple search, the search for word/phase is disabled. In full text search, the user can use the search on a particular word/phase.

<u>Case Filing / Submission Screen</u>

Up to three options may be chosen. If an option is selected, then the field or drop down box must be completed.
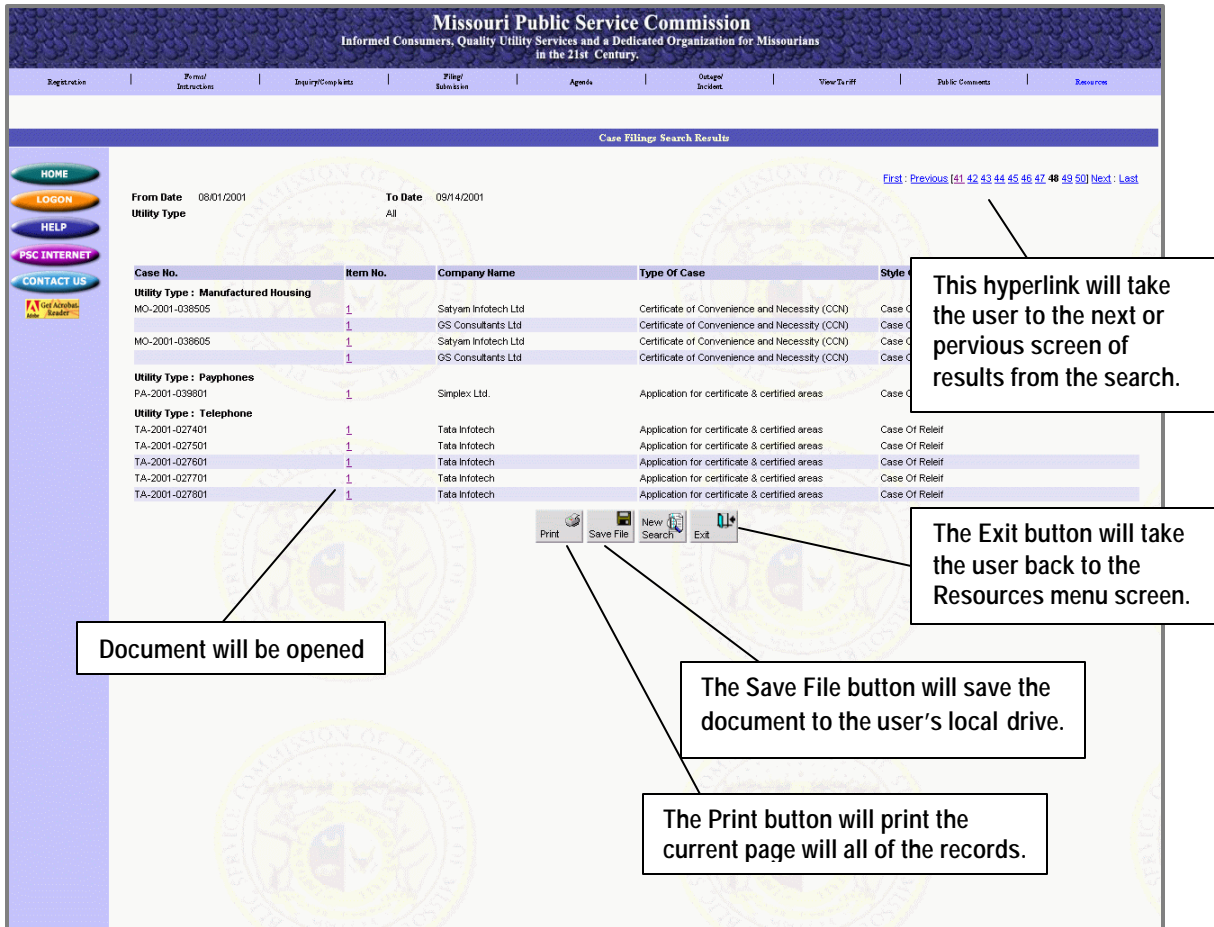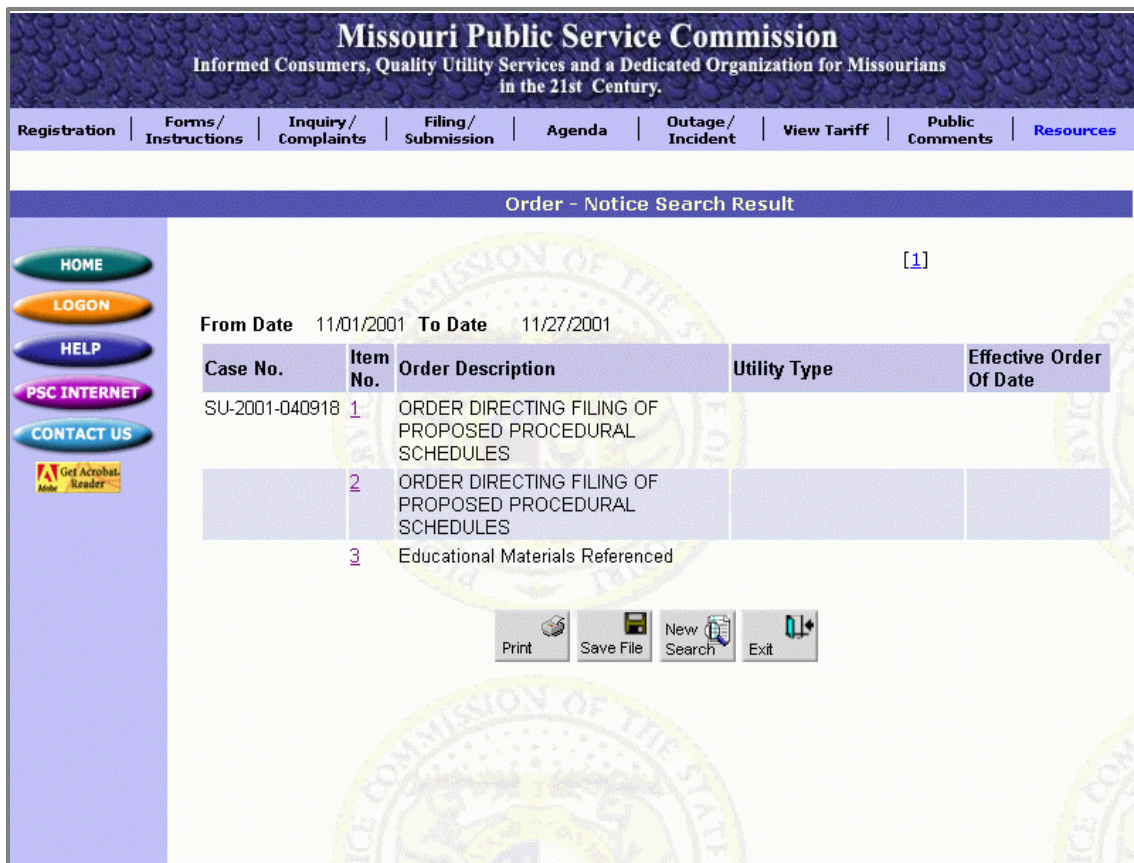
❖ Simple search is the default. Full text search allows the user to search for a word or phrase in the report. One of these options must be selected.

❖ The Full Text search option will not be available until the user's have been specifically trained on RetrievalWare software

❖ The From and To dates can be selected from the calendar or entered manually.

This screen is used to display the report as per the user-selected criteria in the previous screen. The page navigation bar at the top-right hand corner is used to navigate to the next 10 sets of records.

Depending upon the search criteria the result screen will display with headings which will not be displayed in the other details if exists.

Case Filings / Submission Results Screen

9.1.3 Order - Notices Issued

This option displays Order/Notice details for a user-specified period limited to 12 months and the selected criteria.

<u>Order - Notices Search Screen</u>

This screen is used to view the report generated for a user-selected period and the criteria's selected.

The selected criteria will not be included in the tabular display, instead it will be displayed below the dates. If the selected criteria is Utility Type, Company Name then Utility Type, Company Name are displayed below the dates because they were selected as search criteria on the Search Screen. If the search is based only on dates then all the criteria's will form the columns of the tabular display.

<u>Order - Notices Report Screen</u>

State of Missouri

9.2 Tariff and Interconnection Agreement

<u>Tariff & Interconnection Agreement Menu Screen</u>
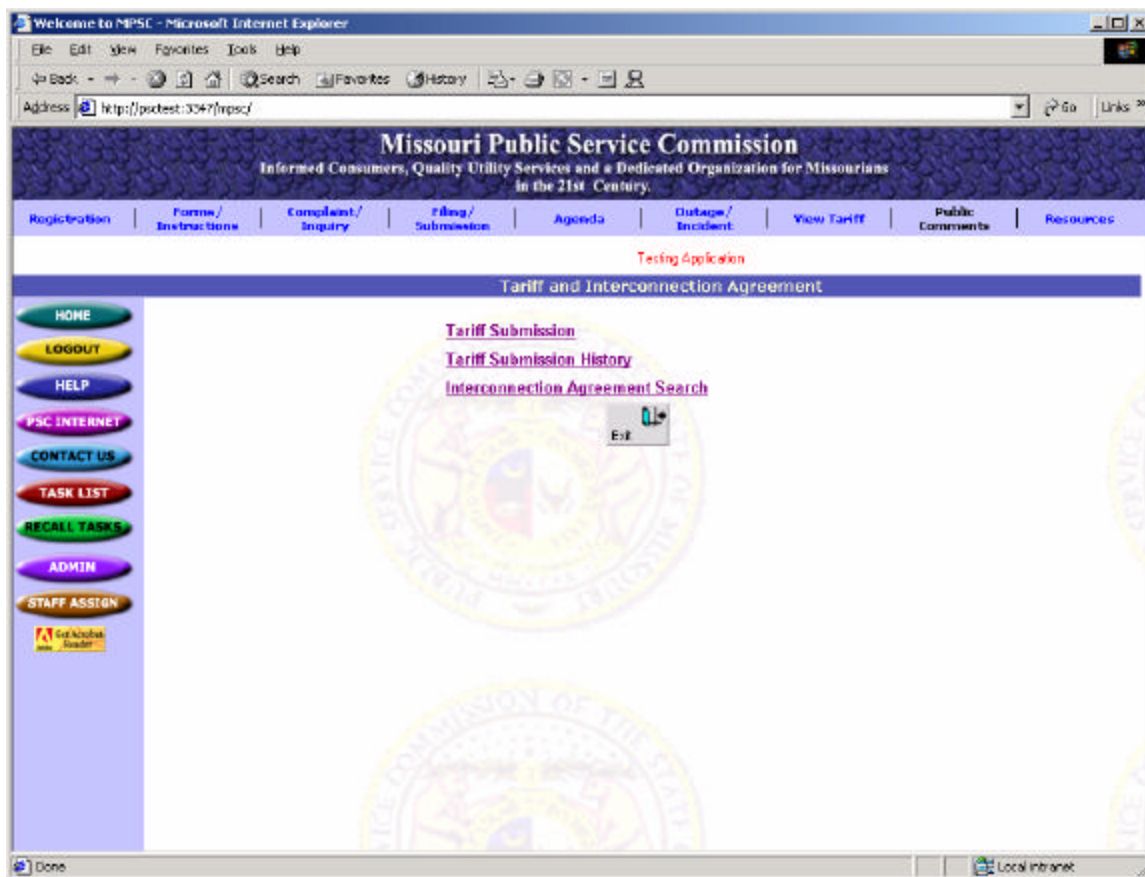
9.2.1 Tariff Submission

This report is generated depending on utility type for a selected range of dates. The date can be either entered manually or selected from the calendar button. When the Search button is selected, the results of the search will be displayed for the selected criteria. If invalid data is entered, informational messages will appear when the Search button is selected.

<u>Tariff Submission Screen</u>
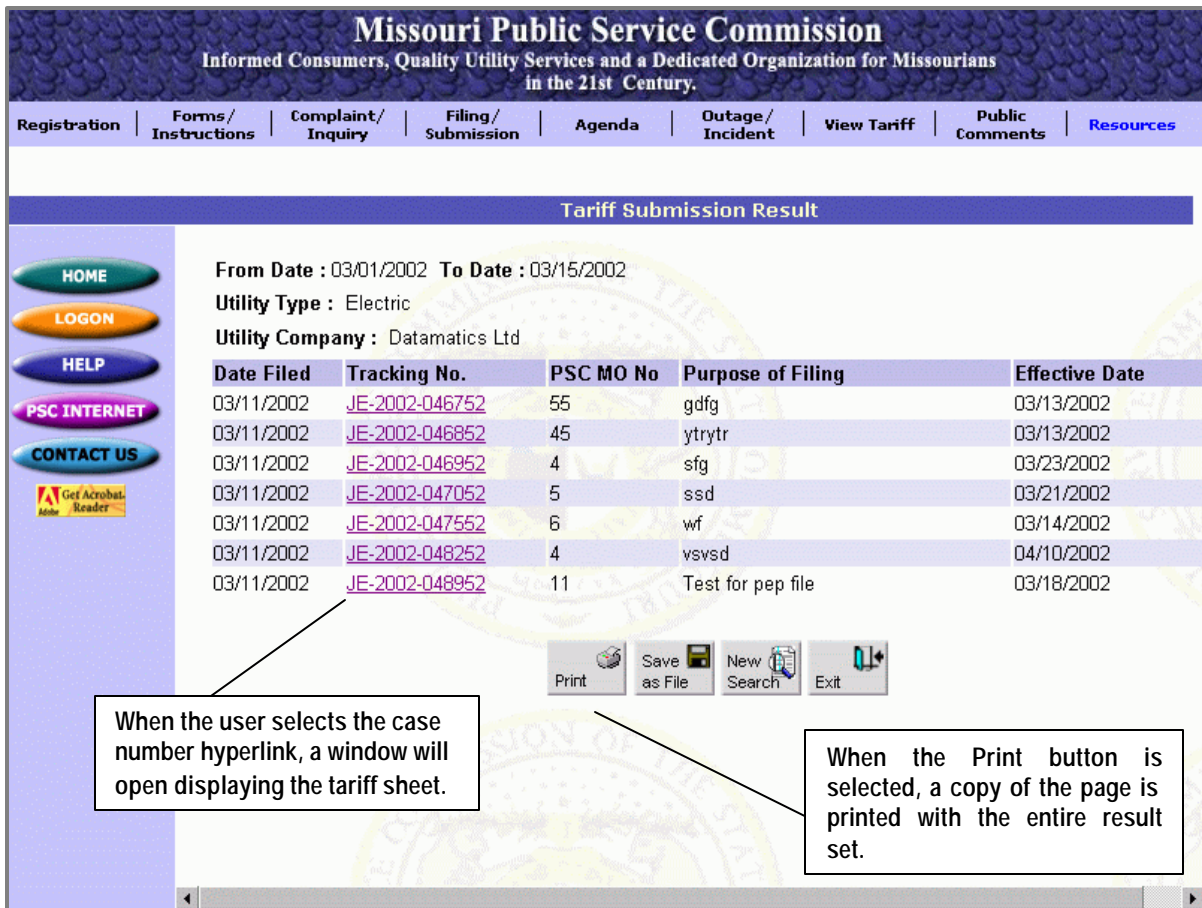
This screen is used to view the report for a user-specified period of 1 month.

Tariff Submission Result Screen

When the user selects the case number hyperlink, a window will open displaying the tariff sheet.

When the Print button is selected, a copy of the page is printed with the entire result set.

9.2.2 Tariff Submission History

This report retrieves all the Tariff Tracking Log Details based on the Tracking No and Case number entered.

Tariff Submission History Screen

9.2.3   Interconnection Agreement Search

This screen is used to generate a report based on either a simple text search or a full text search. If the simple text search is selected, the Interconnection Agreement details for the entered company name 1 or company name 2 will be displayed. If the full text search is selected then the user should enter text in the word textbox. When the Search button is selected, the results will be displayed for the selected criteria.

<u>Interconnection Agreement Screen</u>

This screen is used to display the report as per the user-selected criteria in the previous screen. The page navigation bar at the top-right hand corner is used to navigate to the next 10 sets of records.

<u>Interconnection Agreement Result Screen</u>

9.3 Staff Assignment Search

This option is to view all staff assigned for selected criteria.

Staff Assignment Search

Missouri Public Service Commission
Informed Consumers, Quality Utility Services and a Dedicated Organization for Missourians
in the 21st Century.

Registration | Forms/ Instructions | Inquiry/ Complaints | Filing/ Submission | Agenda | Outage/ Incident | View Tariff | Public Comments | Resources

Staff Assignment Search

From 08/01/2001   To 08/25/2001   (Any twelve month period)
● Commission Cases ○ Appeal Cases ○ FERC Cases ○ FCC Cases ○ Non Case ○ Small Company
○ InterConnection ○ Tariff Submission

Select Maximum Any Three Criterion
☐ Type of Case   Select
☐ Case/Tracking No.
☑ Utility Type   Electric
☐ Designation   Select
☐ Company Name   Select

Search   Clear   Exit

From and To dates must be selected. The dates can be entered manually or using the calendar drop down.
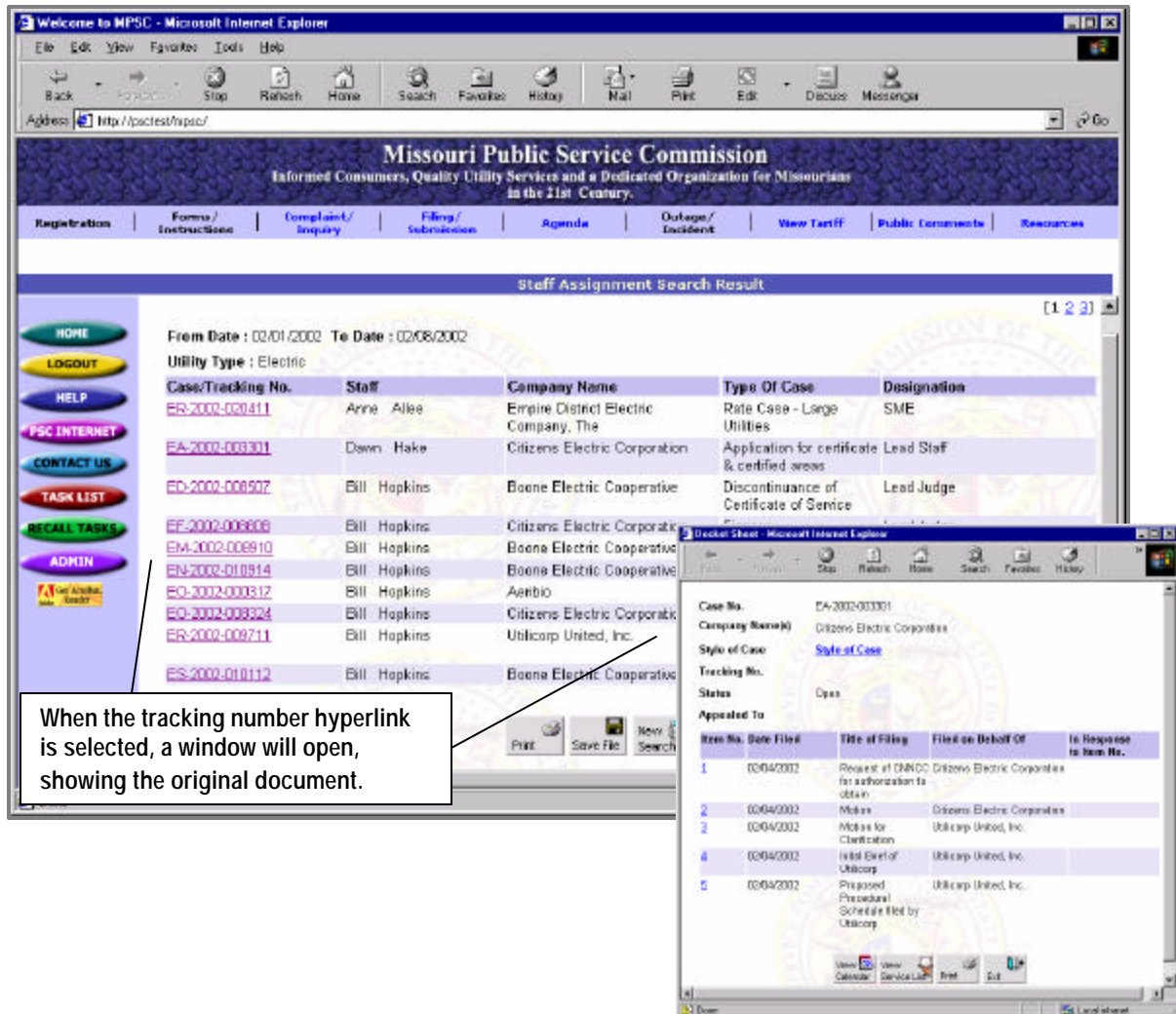
One of the radio buttons for the filing type must be selected. Commission Cases is the default.

When one of the check boxes is selected, then the user must select an option from the drop down menu. If an option is not selected, then an error message will appear when the Submit button is pressed.

Staff Assignment Result Screen

When the tracking number hyperlink is selected, a window will open, showing the original document.

9.4   Calendars

<u>Calendars Menu Screen</u>
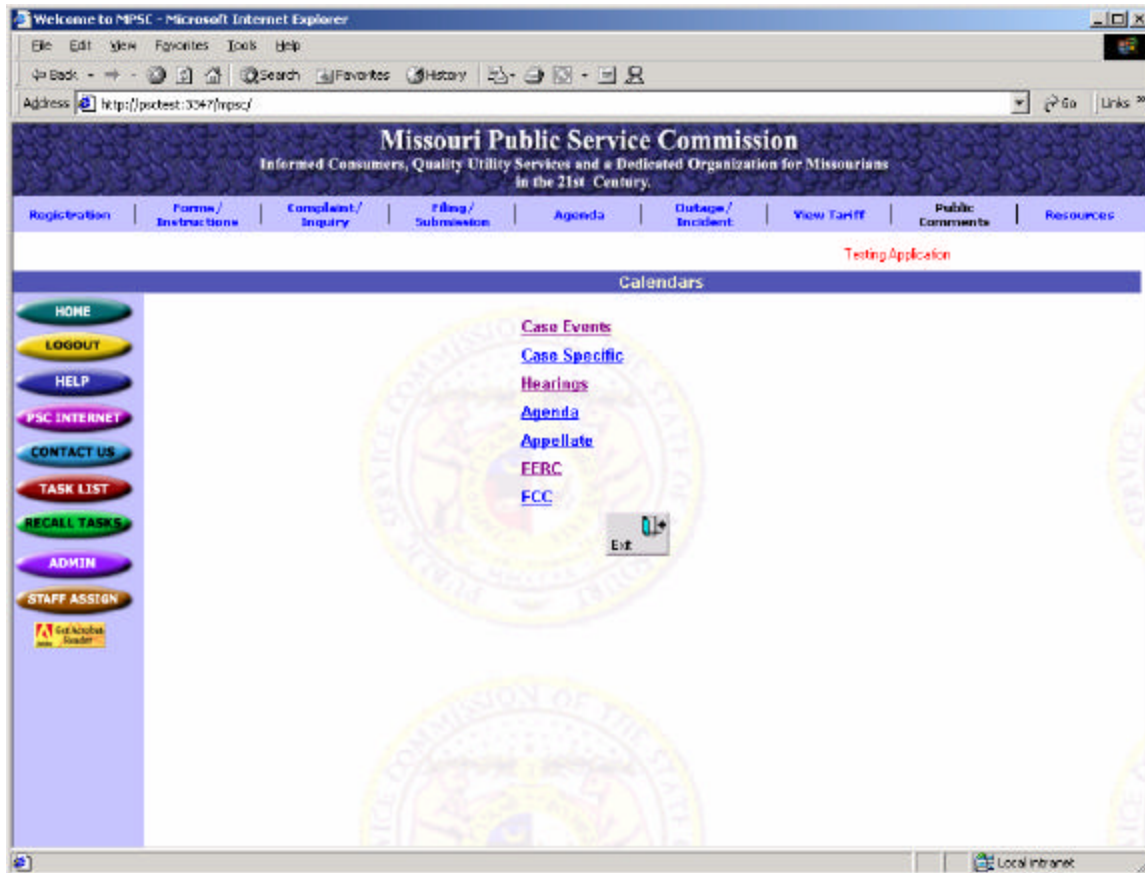
9.4.1   Case Events

This option is to view all case events for in the selected time period.

<u>Calendar - Case Events Search</u>

Calendar Case Events Result Screen

Missouri Public Service Commission
Informed Consumers, Quality Utility Services and a Dedicated Organization for Missourians
in the 21st Century.

| Registration | Forms / Instructions | Inquiry / Complaints | Filing / Submission | Agenda | Outage / Incident | View Tariff | Public Comments | Resources |

Calendar - Case Events Result

HOME
LOGON
HELP
PSC INTERNET
CONTACT US
Get Acrobat Reader

From : 09/01/2001   **To :** 09/20/2001

The dates of the Calendar Search.

[1]

| Case No. | Sl.No. | Calendar Entries | From Date/Time | To Date | Location |
| EU-2001-093318 | 1 | Staff Recommendation`s | 09/02/2001 11:00 AM | 09/02/2001 | MPSC Agenda room |

Print   Save File   New Search   Exit
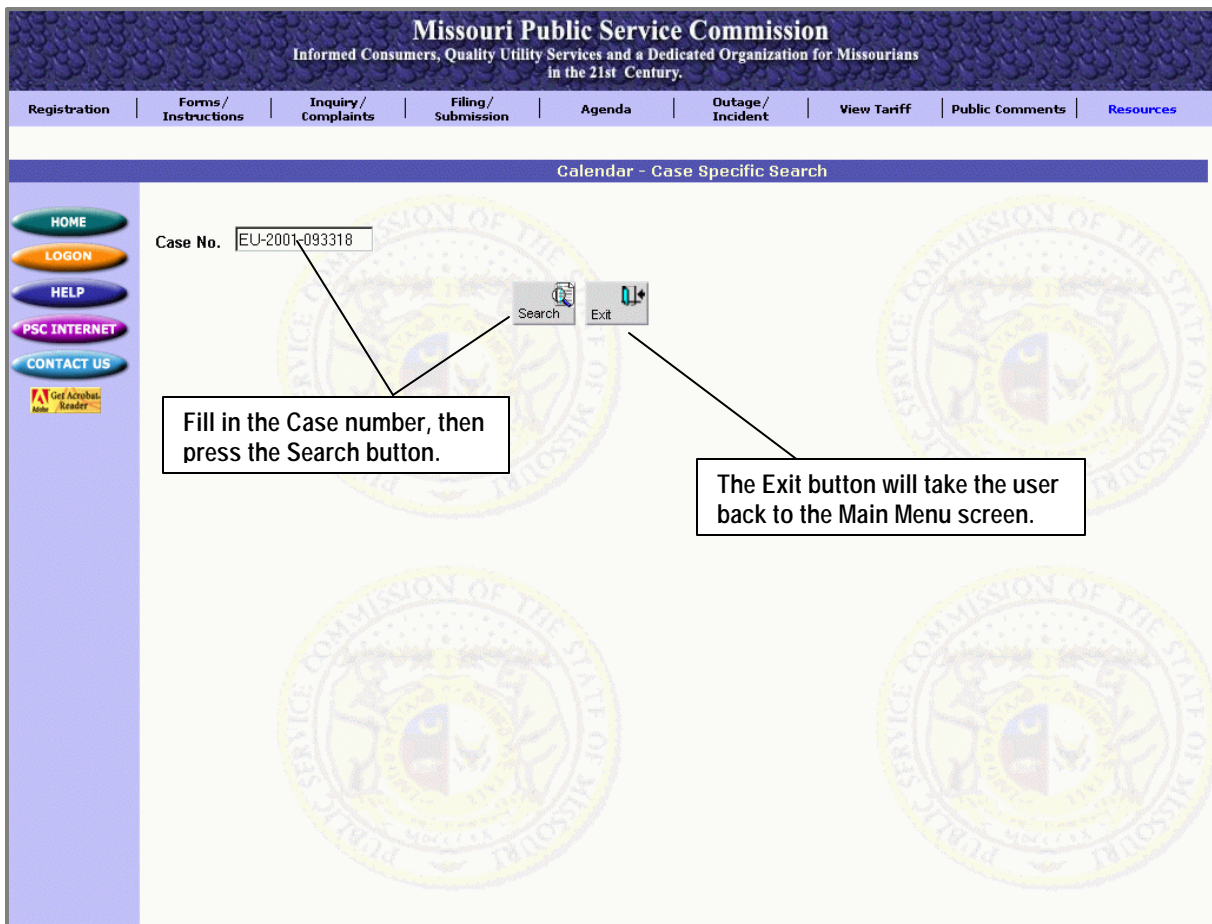
The Case Number hyperlink will open a separate window showing the case information.

9.4.2   Case Specific

This screen is used to display the case specific details for the entered case number. The generated report will be based on the case number. When the Search button is selected, the results will be displayed for the selected criteria.

Case Specific Search Screen

This screen is used to display the report as per the user-selected criteria in the previous screen. The page navigation bar at the top-right hand corner is used to navigate to the next 10 set of records. The result screen will display case number as headings.

<u>Case Specific Result Screen</u>

The case number hyperlink will open a separate window showing the docket sheet.

The column headings identify the details that are displayed from the search.

9.4.3   Hearings

This screen is used to search for the hearing details for an entered case number or between the given dates. The generated report can be based on the case number or the From and To dates or both. The dates can be either entered manually or selected from the calendar button. The selected dates should not be more than 3 months. When the Search button is selected, the details of the search will be displayed for the selected criteria.

<u>Hearings Search Screen</u>

This screen displays the report based on the user-selected criteria from the previous screen. The page navigation bar at the top-right hand corner is used to navigate to the next 10 sets of records.

If the search criteria are only dates then the result screen will display dates as headings with other report details. If the case number by itself is selected, the result screen will display the case number as headings and in the report other details will be displayed without the case number. If both dates and case number are selected, the result screen will display both the dates and case number as headings and in the report other details will be displayed without the case number.

<u>Hearings Search Result Screen</u>

9.4.4 Agenda

This option displays all Agenda details for a specific case for a user-specified period of 3 months. The criteria for this report are From date and To date.

Agenda Report Initial Screen
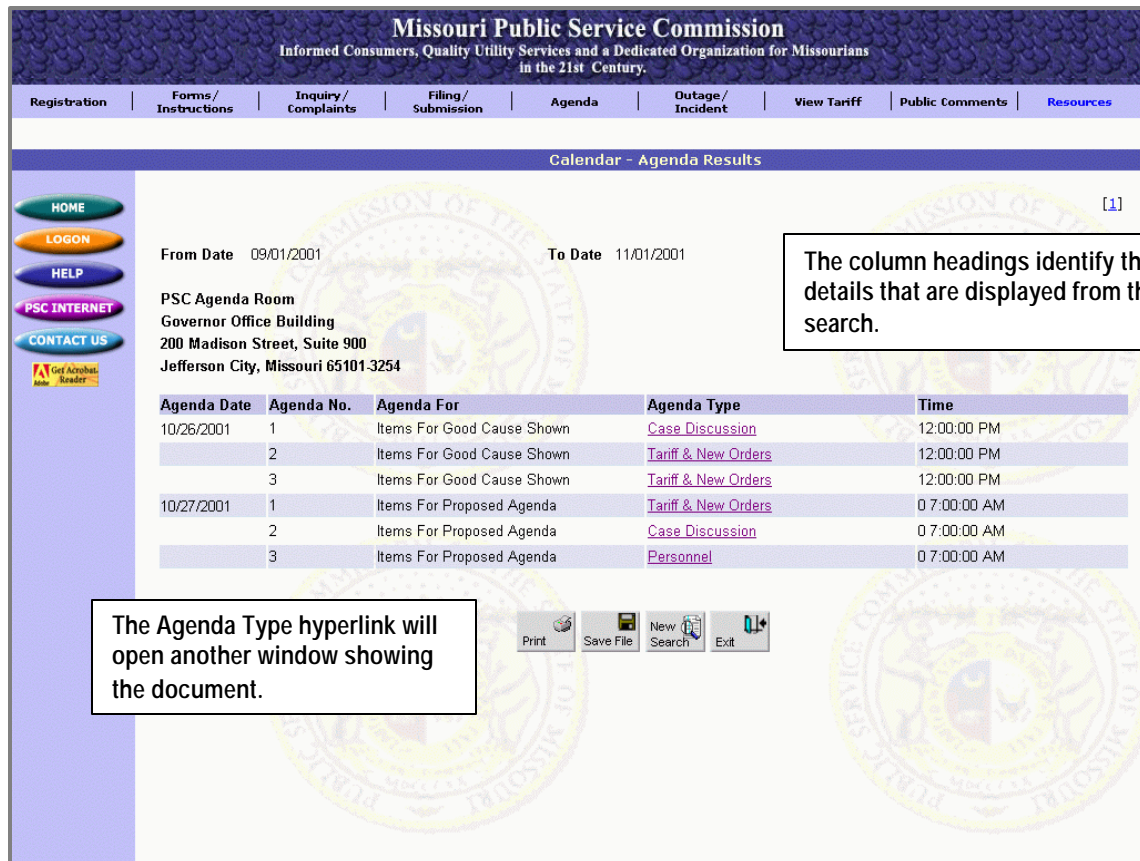
This screen shows results of the search for the user-specified dates of 3 months or less than 3 months. It generates a monthly status report, which gives the details of the opened cases.

Agenda Search Result Screen

9.5   Company Contact Address Query

This screen is used to print the company contact address query details. The generated report can be based on selected criteria such as Utility Type - Gas, Electric, etc. The print format can be either a List or Label or Envelope. On preview the report is displayed for the selected criteria in front of the user.

Company Contact Address Query Initial Screen

On selecting the Display option, It displays the following screen for the selected criteria. The page navigation bar at the top-right hand corner is used to navigate to the next 10 sets of records.

On selection of E-Mail from selection(s) and corresponding name(s) and address(s), the following screen will display. It displays the lists of email ID's based on the criteria selected.
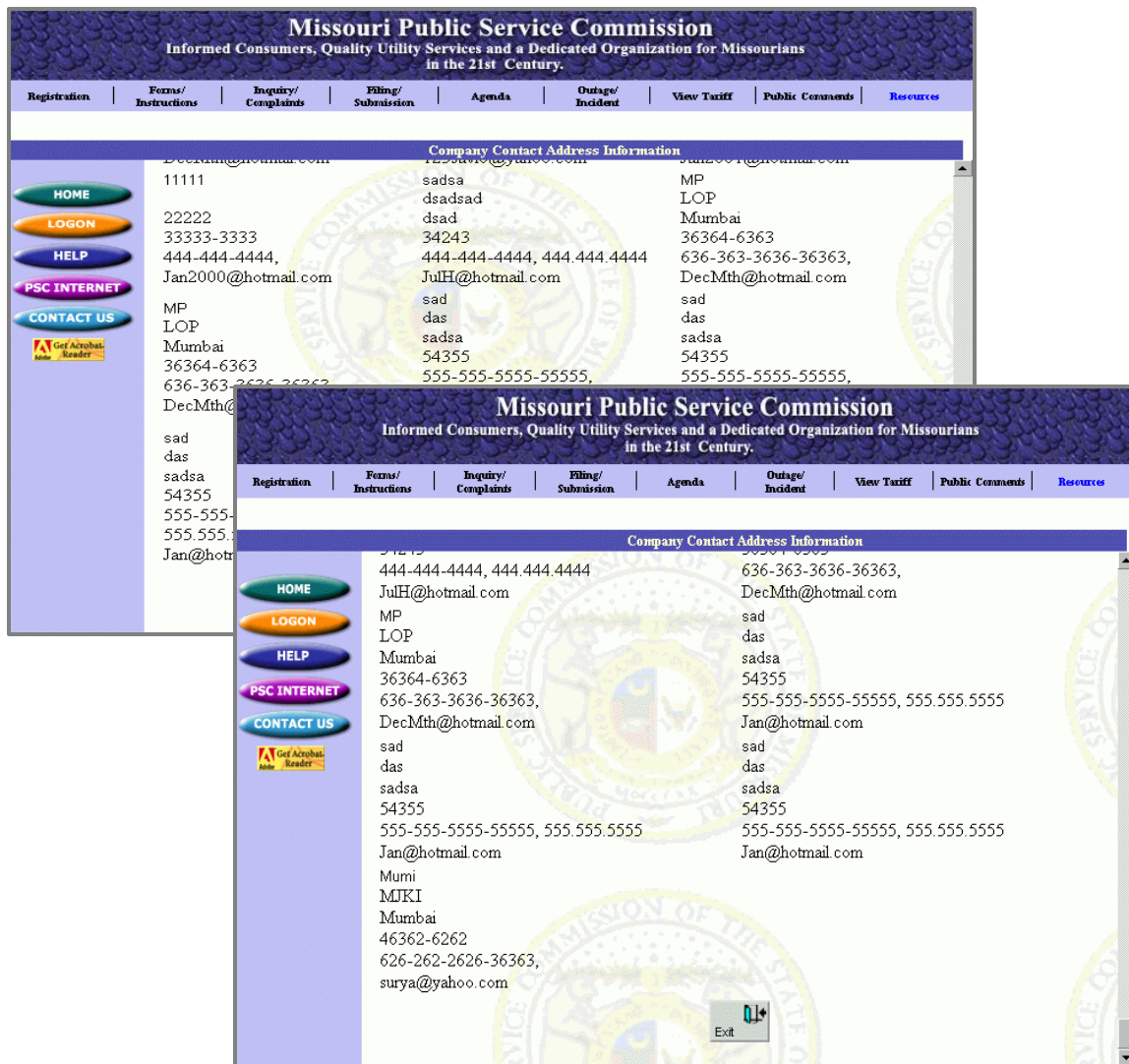
Print Company Contact Address Query- Display, Emails

The user can select either 2 columns Avery #5160 label or 3 columns Avery #5162 label. The following screens will be displayed, depending upon the selected criteria.

<u>Print Company Contact Address Query-Label</u>

On selection of envelope #10, the following screen is displayed. The data is displayed depending upon the selected criteria.

<u>Print Company Contact Address Query – Envelope #10</u>
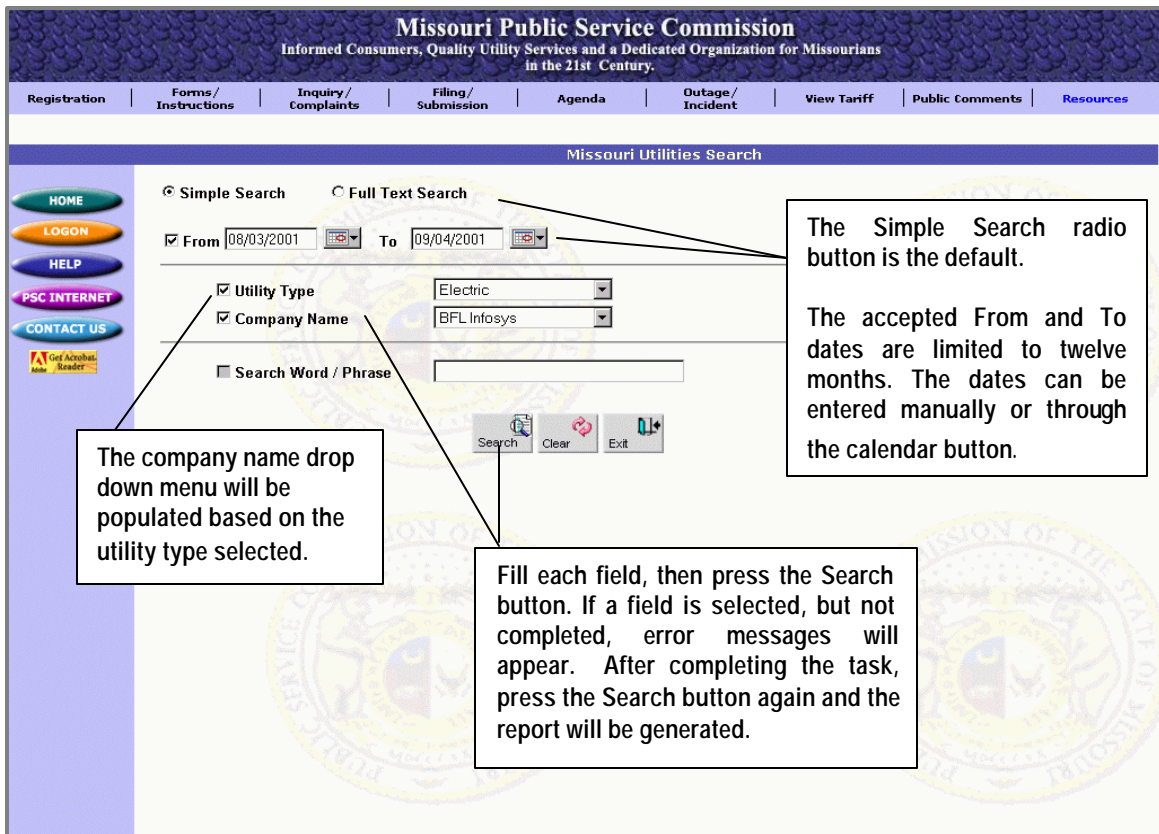
9.6   Missouri Utilities

This Missouri Utilities screen is used to accept the dates or company name to display a detailed report of the entire Missouri utility company details. The report can be based on only dates or company name or both dates and company name. The accepted From and To dates are limited to twelve months. The dates can be entered manually or through the calendar button. If there is no criteria selected, the search and clear button are disabled. In a simple search, the search word/phase is disabled. In full text search, the user can use the search on a particular word/phase.

Missouri Utilities Screen

This screen displays the report based on the user-selected criteria from the previous screen. The page navigation bar at the top-right hand corner is used to navigate to the next 10 sets of records.

If the search criteria are only dates then the result screen will display dates as headings with other report details. If the company name by itself is selected, the result screen will display the company name as headings and in the report other details will be displayed without the company name. If both dates and the company name are selected, the result screen will display both the dates and company name as headings and in the report other details will be displayed without the company name.

<u>Missouri Utilities Results Screen</u>

9.7   Annual Report

This is the Annual Report search screen; it is used to view the list of the annual reports for a specific year submitted by a specific utility company belonging to a specific utility type. The Received radio button is for generating a report of the companies who have submitted their annual report for the specified year and the Not Received radio button is for generating a report of the companies who have not submitted their annual report for the specified year.

<u>Annual Report Initial Screen</u>

The company name drop down menu will be populated based on the utility type selected.

Fill each field, then press the Search button. If a field is selected, but not completed, error messages will appear. After completing the task, press the Search button again and the report will be generated.

The Received radio button is for generating a report of the companies who have submitted their annual report for the specified year and the Not Received radio button is for generating a report of the companies who have not submitted their annual report for the specified year.

This screen is used to view the report for a particular Utility type for the entered year. It displays the Company Names which have submitted the report for the particular year.

Annual Report Received Screen

The tracking number hyperlink will open a separate window showing the tracking sheet.

Once the item is selected and viewed, the color of the item changes to indicate that the document is viewed.

The Print button will print the complete report.

This screen is used to view the report for a particular utility type for the entered year. It displays the company names who have not submitted the report for the particular year.

<u>Annual Report Not Received Screen</u>
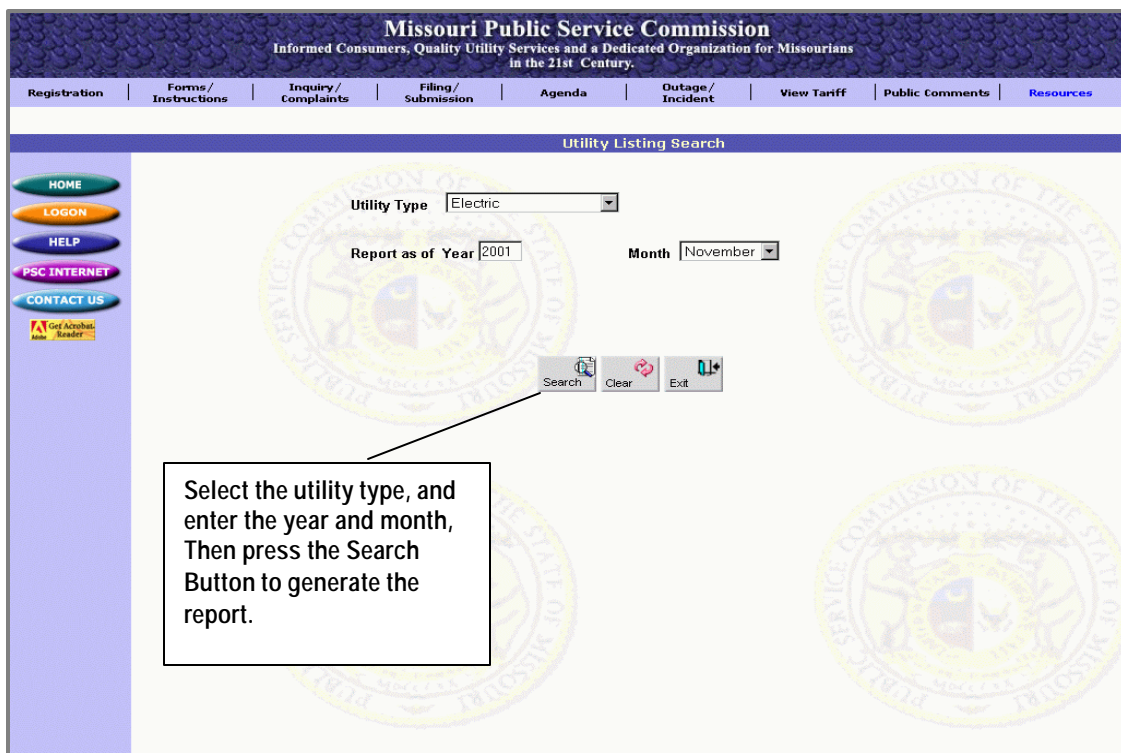
9.8   Utility Listing

This is a static monthly report, which gives a listing according to the utility type (alphabetical order) of all the companies registered with MPSC.

Utility Listing Initial Screen

Select the utility type, and enter the year and month, Then press the Search Button to generate the report.

This screen is used to view the report for a particular utility type for the entered year. It displays the company names, which have submitted the report for the particular year.

Utility Listing Screen